

Chapter 6: The Future of Independence

Staying ahead of the tide

The future of your practice depends on the systems you build today and the people you develop to run them tomorrow. This chapter is your stress test: audit your vulnerabilities before they become crises, then map who is ready, now and in the next 1-2 years, to carry the practice forward.

How to use these worksheets

Work through one chapter per session with your leadership team.

Know it is answered individually. Own it is answered together. Do it assigns an owner and a date.

Finish each chapter by filling the 90-day action plan, then review it at your weekly standup.

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CHAPTER 6

The Future of Independence

Staying ahead of the tide

The future of your practice depends on the systems you build today and the people you develop to run them tomorrow. This chapter is your stress test: audit your vulnerabilities before they become crises, then map who is ready, now and in the next 1-2 years, to carry the practice forward.

Suggested session: 75 minutes with your leadership team

The future of your practice depends on two things: the systems you build today and the people you develop to run them tomorrow. Succession planning is something you do now, while you still have time to shape the outcome, rather than when you are ready to retire.

From the Operator's Chair

Practices crumble when a senior physician retires without a plan. Staff scatter, patients are left without continuity, and decades of community trust can evaporate in months. Protect the Breakwater: the barrier around what matters most. That means building a practice that can outlast any single person, including you.

Two questions this chapter answers

Could we survive a shock without scrambling: a lost physician, a revenue drop, a system failure?

If a critical person left tomorrow, does someone already know how to step in?

Succession planning is about resilience more than retirement. What happens if your practice manager gets a better offer next month? What happens if your lead physician has a health crisis? The practices that survive these shocks are the ones that have already identified who's next, what they need to learn, and how they'll be developed. This is responsible leadership, not morbid planning.

Every critical role in your practice should have a name next to it: someone who is ready now, and someone who could be ready in one to two years with the right development.

Keep the Breakwater strong

Independence is not a state of being. It is a practice: a set of disciplines, rhythms, and choices. Keep this workbook visible, revisit it quarterly, and let it drive your decisions. Your ongoing rhythm: daily huddles, weekly standups, monthly financial and process reviews, quarterly resets and self-assessments, semi-annual resilience audits and succession reviews, and an annual Independence Aim review.

WORKSHEET 6.1

Resilience Audit

Lesson: Stress-Test Your Practice

Purpose: Identify your practice's vulnerabilities and build a plan to address them before they become crises.

Participants: Leadership team, practice manager, and senior staff.

1 KNOW IT

Rate each statement honestly. This is a stress test, not a report card. Scale: 1 = Not at all, 5 = Completely.

1. We could survive the loss of our top revenue-producing physician for 6 months.

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

2. We could survive a 15% revenue drop for 12 months without layoffs.

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

3. Our key processes are documented and could be run by someone else.

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

4. We have a succession plan for every critical role.

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

5. Our technology systems have backups and disaster recovery plans.

- ☐ 1
- ☐ 2
- ☐ 3

- ☐ 4
- ☐ 5

6. We have strong relationships with at least 3 payers (not dependent on one).

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

7. Our staff morale is strong enough to weather a difficult quarter.

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

8. We have legal and compliance counsel we can reach within 24 hours.

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

Total Score: _____ / 40. 32-40: Strong resilience, maintain your systems and keep stress-testing. 24-31: Moderate resilience, address the lowest-scoring areas this quarter. 16-23: Vulnerable, prioritize resilience-building immediately. Below 16: Critical, your practice is one crisis away from serious trouble.

10. What's our single biggest vulnerability?

2 OWN IT

Discuss as a team and prioritize the top 3 vulnerabilities to address.

1. Top 3 vulnerabilities

#	Vulnerability	Impact if Not Addressed	Owner	Deadline
1				
2				

#	Vulnerability	Impact if Not Addressed	Owner	Deadline
3				

3 DO IT

This week and beyond. Turn this into action.

Action 1: Address your #1 vulnerability this quarter

- ☐ Define the specific risk
- ☐ Assign an owner
- ☐ Set a deadline
- ☐ Report progress at each monthly leadership meeting

Owner	Deadline

Action 2: Schedule a semi-annual resilience audit

- ☐ Retake this assessment every 6 months
- ☐ Compare scores over time
- ☐ Celebrate improvement and address persistent gaps

Owner	Deadline

WORKSHEET 6.2

Succession Planning

Lesson: Build a Practice That Outlasts Any Single Person
Purpose: Identify succession risks and build a development plan for the next generation of leaders.
Participants: All partners, practice manager, and senior staff.

From the Operator's Chair: Succession planning is about resilience more than retirement. What happens if your practice manager gets a better offer next month? What happens if your lead physician has a health crisis? The practices that survive these shocks are the ones that have already identified who's next, what they need to learn, and how they'll be developed. This is responsible leadership, not morbid planning. Every critical role in your practice should have a name next to it: someone who is ready now, and someone who could be ready in one to two years with the right development.

1 KNOW IT

This worksheet opens directly into Own It: map the succession pipeline before discussing risk.

2 OWN IT

Map the succession pipeline for every critical role.

Critical Role	Current Holder	Ready Now	Ready in 1-2 Years	Development
Managing Partner				
Practice Manager				
Lead Physician				
Billing Director				
Clinical Director				
IT / Systems Lead				
Other: _____				

2. Discussion prompt 1: Which role has the highest succession risk? What would happen if that person left tomorrow?

3. Discussion prompt 2: For the highest-risk role, what are 3 specific development actions we can take in the next 90 days?

3 DO IT

This week and beyond. Turn this into action.

Action 1: Start developing your highest-risk successor

- ☐ Identify the role with the highest succession risk
- ☐ Define 3 specific development actions
- ☐ Assign a mentor or coach
- ☐ Schedule quarterly check-ins to monitor progress

Owner	Deadline

Action 2: Document institutional knowledge

- ☐ For each critical role, identify the knowledge that exists only in one person's head
- ☐ Begin documenting it as standard work, playbooks, or training materials
- ☐ Store it where others can access it

Owner	Deadline

90-DAY ACTION PLAN | CHAPTER 6

The Future of Independence

Consolidate every action item from this chapter into one tracking sheet. Review progress at each weekly standup.

#	Action item	Owner	Deadline	Status
1				
2				
3				
4				
5				
6				

Session date

90-day review date

Key insight from this chapter