



Succession Planning for SMEs – Advisory



Why Succession Planning Matters

Most Irish SMEs rely heavily on one person – usually the MD or founder. Without a clear succession plan, the business's value, continuity, and stability are at risk. A structured plan protects what you've built, gives you options, and allows you to step back on your terms.

Succession Planning Expertise

Our Founder and Managing Director, Joe O'Reilly, brings deep experience in Business Strategy, Sales, Marketing, Leadership, Export and New Market Development. He is an experienced Business Mentor and Certified Executive Coach and works extensively across a number of LEOs (Local Enterprise Office). Joe has supported hundreds of Irish SMEs with mentoring and business coaching including family-run businesses, partnerships, and owner-dependent operations.



Joe O'Reilly

40+ years experience
'helping people and
companies grow'

Key Lessons From Working With Irish Business

- Communication is key. Difficult conversations avoided early become problems later.
- Clarity is essential. Many SMEs suffer from unclear ownership and decision-making.
- Protect the engine of the business. Succession must not disrupt sales, delivery, or customers.
- Be informed. Owners need clear visibility on financial, tax, legal, and leadership realities.
- There is a time to let go. Succession requires a controlled, structured transition.

What a Strong Succession Plan Covers

- Future direction of the business
- Successor identification and development
- Ownership and transfer structures
- Financial/pension planning for tax-efficient value extraction
- Legal and governance requirements
- A clear timeline and communication plan

Succession Planning Approach

Joe provides a structured, confidential process that removes ambiguity and enables confident decision-making. His role is to help you design and execute a succession plan that works – commercially, operationally, and personally.

Protect your business, secure your future, and plan your next chapter with clarity.

If you require advice in relation to Succession Planning, get in touch with our team.

