90-day ownership transition plan

Agree on the seller’s handoff duties and the buyer’s sign-off before deciding how much transition support the deal needs.

Shop / location

Review date

Prepared by

Closing through day 30

☐ Assign operating authority

List the first buyer decision-maker for dispatch, purchasing, pricing and callbacks. Record which decisions still require seller help.

Evidence / next action

☐ Transfer vendor relationships

Introduce your parts suppliers and fleet contacts only after agreed disclosure dates. Confirm credit terms, returns and who can authorize work.

Evidence / next action

☐ Hand over access

Have each provider provision a named buyer administrator for the shop system, phone, payroll and subscriptions. Retire seller access after testing.

Evidence / next action

☐ Shadow the owner’s repairs

Tag jobs the seller diagnoses or approves. Have the receiving tech repeat the diagnosis or estimate while the seller observes.

Evidence / next action

Open item, responsible person and due date

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Shop / location

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Prepared by

Days 31 through 90

☐ Reverse the shadow

Let the buyer chair dispatch and the lead tech handle escalations. Log interventions with the reason the seller was contacted.

Evidence / next action

☐ Resolve inherited work

Review open orders, promised warranty repairs, parts cores and fleet credits weekly. Assign a payer and customer contact for each exception.

Evidence / next action

☐ Test independent operation

Agree on a seller-free test period, schedule an escalation contact and log missed authorizations, delayed approvals and unfinished jobs.

Evidence / next action

☐ Sign off on the handoff

Record completed duties, named exceptions, deadlines and both parties’ approvals. Ask counsel to document any change to paid transition time.

Evidence / next action

Open item, responsible person and due date