

Dr Craig West

B. Bus (Management), M. Bus (Accounting & Finance), M. Tax Law, DBA, CEPA

Dr Craig West is a strategic business adviser and founder of [Succession Plus](#), Australia's leading firm in succession and exit planning. With over 25 years of experience advising mid-market business owners, Craig brings deep expertise in valuation, structuring, business value acceleration, and exit strategies. His proprietary 21 Step Process and Peak Performance Trust are highly regarded internationally and have been used with more than 800 businesses over 15 years. Craig's Business Succession and Exit Planning process has been launched as a digital platform for advisers through [Capitaliz](#).



Strategic Business Adviser |
Author | Thought Leader

Craig's academic credentials include a Doctor of Business Administration awarded in July 2022 for his thesis: *"Examination of the key factors driving business exit options in Australian Small and Medium Enterprises."* His research continues to inform his strategic mentoring and advisory work.

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Craig is passionate about helping business owners think strategically, build transferable value, and achieve successful exits. His work is grounded in research, enriched by experience, and driven by a commitment to empowering entrepreneurs.

- Published Works

Craig is the author of critically acclaimed books:

- [Build It](#): How to Get Your Employees to Think and Act Like Business Owners
- [Enjoy It](#): Business Succession and Exit Planning
- [Protect It](#): Asset Protection and Exit Strategies
- [It All Begins With Insights](#): A Quick Guide to Maximising the Value of Your Business
- [Employee Ownership](#): A New Business Model to Attract, Retain, and Reward Your Key People to Help You Build a Significant Business
- [Exit Like a Boss](#): A Comprehensive Guide to Exit Planning

- Leadership & Influence

Craig served as Executive Chairman of the SME Association of Australia, representing over 300,000 business owners. He has delivered keynote presentations and adviser education programs for CPA Australia, IOOF, CICA, and the Institute of Chartered Accountants. He is also the Non-Executive Chairman of Umwelt Australia (since 2017), a high growth environmental consulting firm with nearly 50% of the business owned by over 100 employees.

- Awards & Recognition

- Exit Planner of the Year, Exit Planning Institute Annual Conference, Texas (2014)
- International Exit Planning Circle of Excellence, Exit Planning Institute (2024)
- Employee Share Ownership Plan of the Year, Employee Ownership Australia

- Media & Podcasts

- Host of [Exit Like a Boss – The 21-Step Challenge](#), a podcast to help you, your business and your finances get ready to exit like a boss.
- Host of ["Mid-Market Matters"](#) – a podcast focused on medium-sized businesses
- Co-host of [SME Experts](#) with Mark Bouris on Podcast One.

- Employee Ownership

Craig is a passionate advocate for employee ownership. His proprietary Peak Performance Trust structure has been recognised nationally, winning the Employee Share Ownership Plan (ESOP) of the Year award twice in four years.