

A Checklist for Taking Over the Family Jewelry Store

Use this checklist to stay organized, make smart changes, and keep what makes your jewelry store feel like home.

1 Listen Before You Lead

Before you change anything, understand how the jewelry store runs today.

- Ask employees what works well and what feels outdated.
- Talk to loyal customers about why they choose your store.
- Review reports to spot peak hours and bestsellers.
- Spend a few days shadowing the daily routine without interfering.

2 Acknowledge the Emotions

Change is personal for staff, customers, and family.

- Sit down with employees and family to hear their thoughts.
- Listen without jumping to solutions — sometimes people just want to be heard.

3 Communicate Clearly and Often

Uncertainty causes stress. Keep communication open and simple.

- Announce the leadership change to staff, vendors, and customers.
- Share your vision for the store.
- Keep people updated with quick meetings, signage, and emails.

4 Modernize What Slows You Down

Upgrade behind-the-scenes tools.

- List any slow or manual processes (like paper tickets or old registers).
- Explore cloud-based jewelry POS systems for repairs, appraisals, and custom orders.
- Use your sales data to restock smarter and avoid overordering.

5 Keep What Makes the Store Special

Don't modernize at the cost of losing your store's charm.

- Ask your team what traditions matter most.
- Keep meaningful touches like thank-you cards or water bottles.
- Preserve iconic displays and decor that regulars love.

6 Define the Transition Plan

Avoid confusion by defining roles, responsibilities, and timelines.

- Clarify who makes final decisions.
- Set up a go-to person for staff questions.
- Decide what role the previous owner will have, if any.
- Create a timeline with key steps and goals.

7 Invite Staff Into the Process

People support what they help build.

- Ask for ideas in team meetings or one-on-ones.
- Assign small projects like updating displays or refreshing signage.
- Involve staff in branding, packaging, and store experience upgrades.
- Celebrate wins and give credit where it's due.

8 Ask for Help

You don't have to do everything yourself.

- Find a mentor or coach who's taken over a family business.
- Hire a bookkeeper to stay on top of the numbers.
- Choose a jewelry-focused POS provider with onboarding support.
- Join a peer group of next-gen or small business owners.