Succession Planning Considerations and Best Practices

High level, succession planning can be a simple, four-step process:

- **Step 1: Planning (for the inevitable) -** the process of preparing for a future that involves transition, change, and disruption; building, gathering and maintaining artifacts.
- **Step 2: Pressure testing/alignment –** taking everything you do in Step 1 and "testing" it for its feasibility, useability, assumptions behind the planning (bonus points for bias, relevance, and equity=opportunity for change) and organizational stability and viability
- **Step 3: Implementation/transition –** putting all your planning into action – having the steps in place to move new people in and around, and support their success; asking for and taking feedback
- **Step 4: Onboarding/Maintenance –** bringing new people on and into the organization; ensuring that the organization is on track and moving forward
- **[Step 5: Go back to Step 1] –** continuous improvement, radical incrementalism

At each step, you want to think about 4 things:

- **People** (our internal/external staff, Board, stakeholders, and audiences/customers)
- **Policies/Procedures** (the documents/processes/"rules" that guide our work)
- **Finances** (money handling and managing; ensuring business can keep running)
- **Communications** (sharing information with the different groups of people at the "right" or appropriate time)

Step One - Planning

- *People*:
  - *For staff*: ensure you have clear job descriptions that lay out critical functions/responsibilities; identify the org's most essential roles, including the skills needed and the responsibilities that must be fulfilled to be successful in those roles; identify internal resources who can fill the role in the short term (internally or externally); develop a talent depth chart.
  - *For Board*: ensure you have clear job descriptions, and consider developing a board member contract that outlines a member's board commitment; create a matrix that outlines the board's strengths and weaknesses from a talent perspective; identify ways to expand the board's network to include people who can lend advice in critical areas; and keep in touch with former leaders who would be willing to step in to help again when needed.
- Policies/Procedures
  - Create/update documents that govern actions and optimize flexibility for unplanned changes
- Finances
  - Ensure organization can continue business as usual regardless of who is there
- Communications
  - Who needs to know what and when?

Step Two – Pressure Testing

- People: Build commitment from stakeholders; socialize the plan and solicit additional inputs/ideas/suggestions
- Communicate: do people who would be tapped on the shoulder know they'll get tapped? Do people know where to go and what to do when we say 'go?' This is like a fire drill, so does everyone know their role/where to go?

- Create proposed timelines, interim job duties, decision trees for critical decisions
- Ensure the business can run regardless of who is at the helm

Step Three – Implementation/transition

- For a staff departure
  - Work through the plan you've created, communicating with those who need to step up on an interim basis
  - Use talent matrix to identify short and long-term solutions
  - Make time to reflect on whether the position needs to evolve/change
  - Initiate conversations with internal talent about the horizon
  - Potentially conduct an external executive search or recruit/hire as normal
  - Share key documentation/vision to find right person
- For board
  - Call on Vice Chair/former chair to step in
  - Tap into extended matrix of talent to help work through/prioritize key decisions
  - Continue conversations with extended network to gauge interest
- Rely on the processes and procedures you've updated to guide your steps
- Share the right information at the right time with the right audiences

Step Four – Onboarding/Maintenance

- Share all artifacts that will rapidly onboard someone new (history of the organization, strategic plan)
- Create a long runway and roadmap for onboarding that might include milestones one year out
- Develop a way to share the right information at the right time (avoid deluge)
- Create a network of trusted advisors for big and small questions (for staff, a board liaison and other internal employees; for board members, a board buddy)
- Take time to solicit feedback from trusted stakeholders
- Share policies in a way that creates time to process/reflect and ask questions
- Ensure processes are streamlined to include the new person at the right stages
- Share high-level plans/timelines for the new person's integration and the longer-term horizon with all stakeholders (customize based on who you're sharing with)

Phase 5: Back to phase 1

- Start back at the first step but make time to reflect.
- What worked during the process?
- What didn't?
- What would you do differently?
- What circumstances have changed since the current leader took on the role?
- How do leaders at equivalent organizations compare?
- Can continuing challenge points in other leadership roles be absorbed into the updated position?