

# SUCCESSION PLANNING

A KEY TO LEADERSHIP SUCCESS &  
SUSTAINABILITY





# Planning Differences

## Replacement

### Planning

- Immediate need
- Long learning curve
- No transition period

## Succession

### Planning

- Builds long-term pool of talent
- Training, i.e., job shadowing
- Downstream vacancies filled



# Decision-making Differences

## Replacement

### Planning

- Back-up candidate usually by default
- Maintain status quo
- Cannot capitalize on careful decision-making

## Succession

### Planning

- Based on job requirements
- Based on evidence-based assessments
- Best electoral decision



# Outcome Differences

## Replacement

### Planning

- Limited pool
- No inherent skill development
- Candidates may not be ready

## Succession

### Planning

- Development in nature
- New tasks, projects or skills
- Remain engaged



## SUCCESSION PLANNING FOR CWRTs

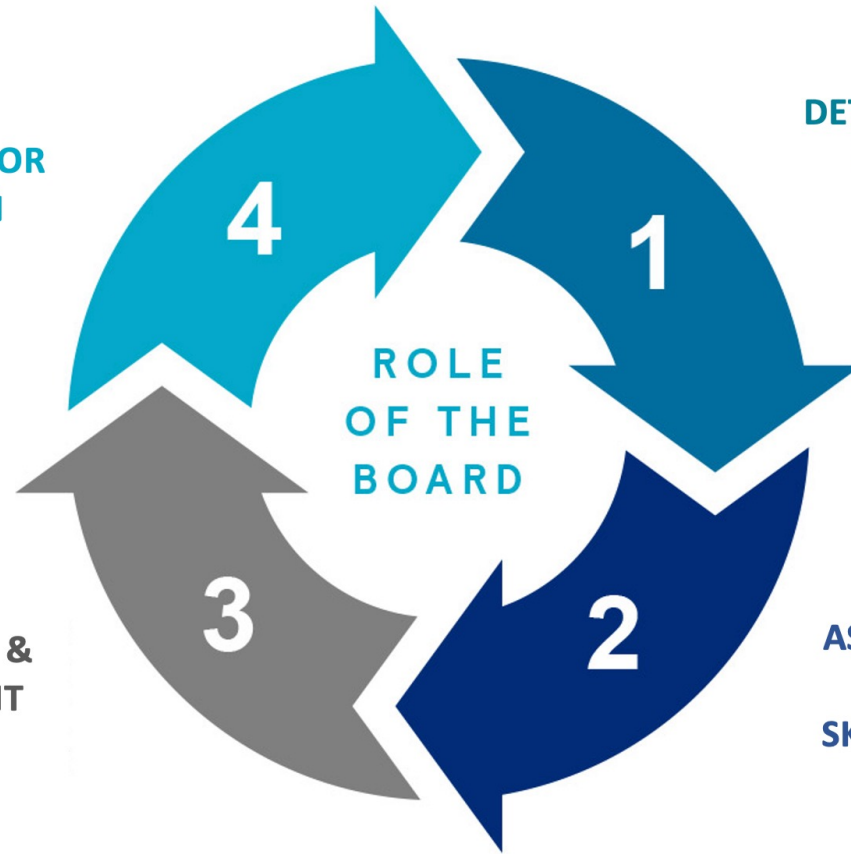
ASSESS  
READINESS FOR  
SELECTION

DETERMINE NEEDS  
& SELECTION  
CRITERIA

ROLE  
OF THE  
BOARD

ORIENTATION &  
DEVELOPMENT  
ROTATION

ASSESS MEMBERS  
KNOWLEDGE  
SKILLS & ABILITIES



# Needs & Criteria



## PROGRAM INITIATION

Develop characteristics of great program

Business case to the board

Board approval & involvement

Establish *Advisor* positions on the board

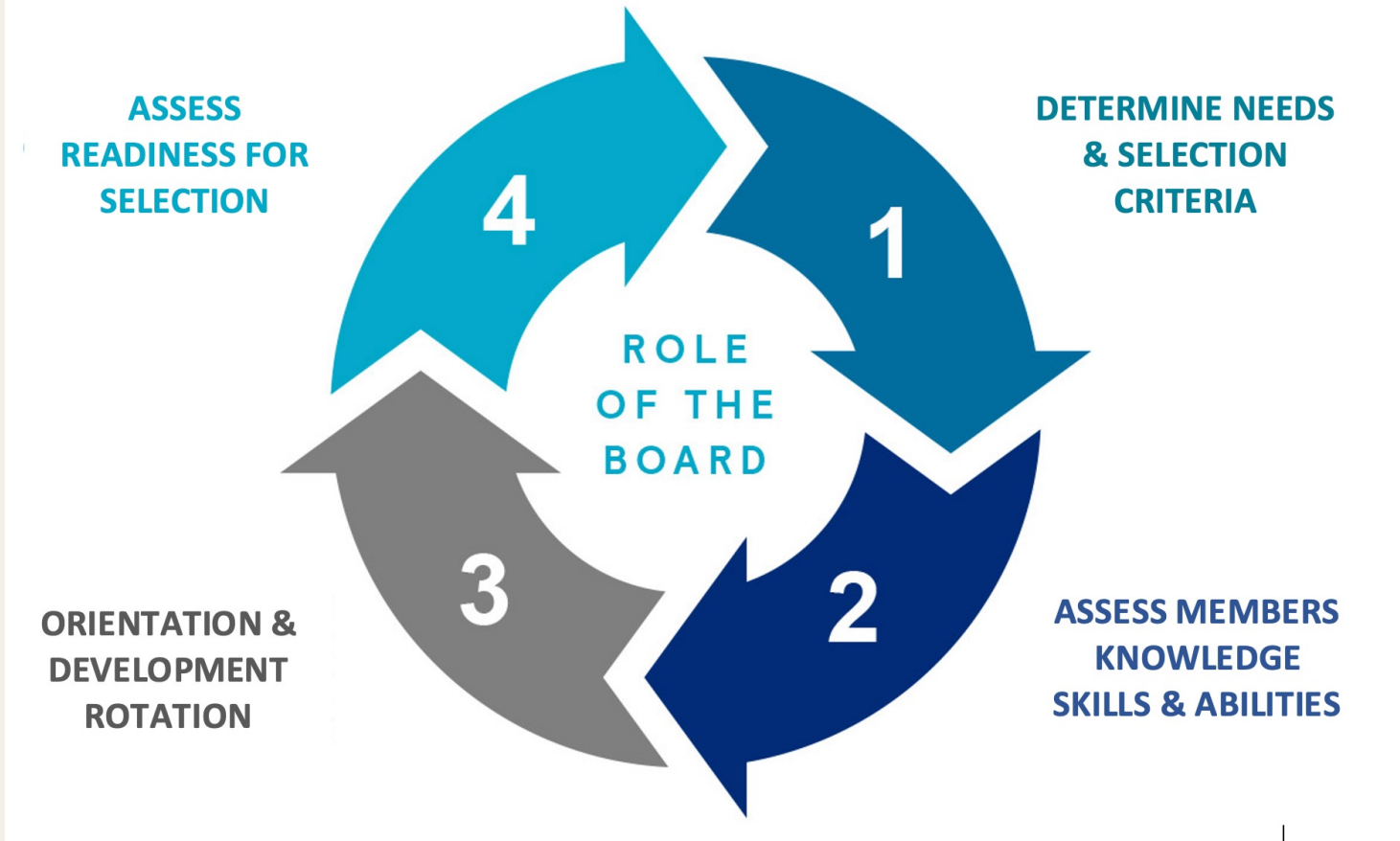
Ensure position descriptions are available

Determine positions in the program

Candidate selection skills & desire



## SUCCESSION PLANNING FOR CWRTs



# Member Assessment



## ASSESSMENT CATEGORIES

Planning

Public Speaking

Recruiting Help

Building Relationships

Crunching Numbers

Managing Time

Leading People

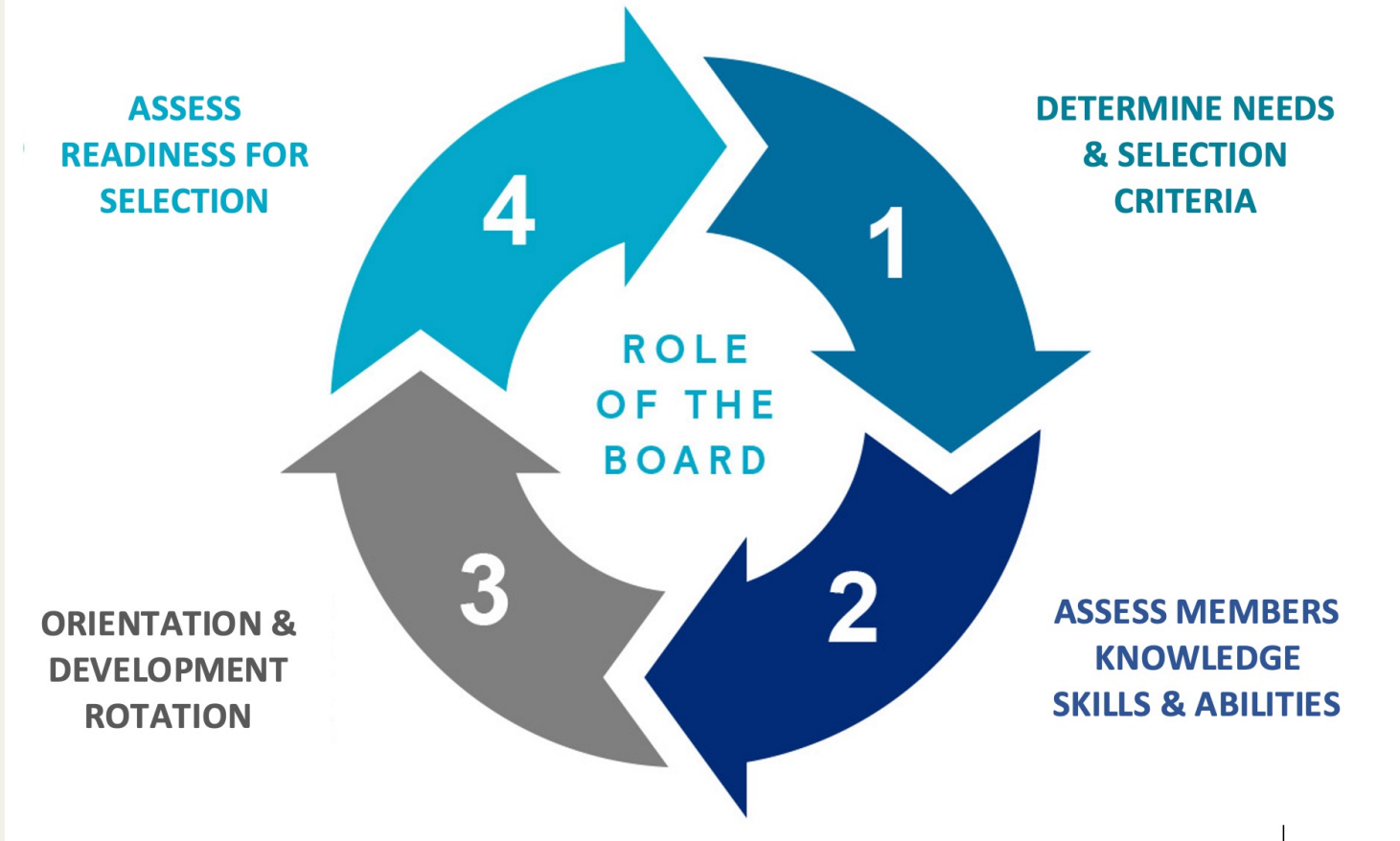
Delegating

Self Care





## SUCCESSION PLANNING FOR CWRTs



# Candidate Development



## TRAINING ROTATION

Board advisor

Board orientation & role

Attend Board meetings but without a vote

Cross-train with board members

Rotate periodically

Provide opportunities at meetings

Assess performance & aptitude

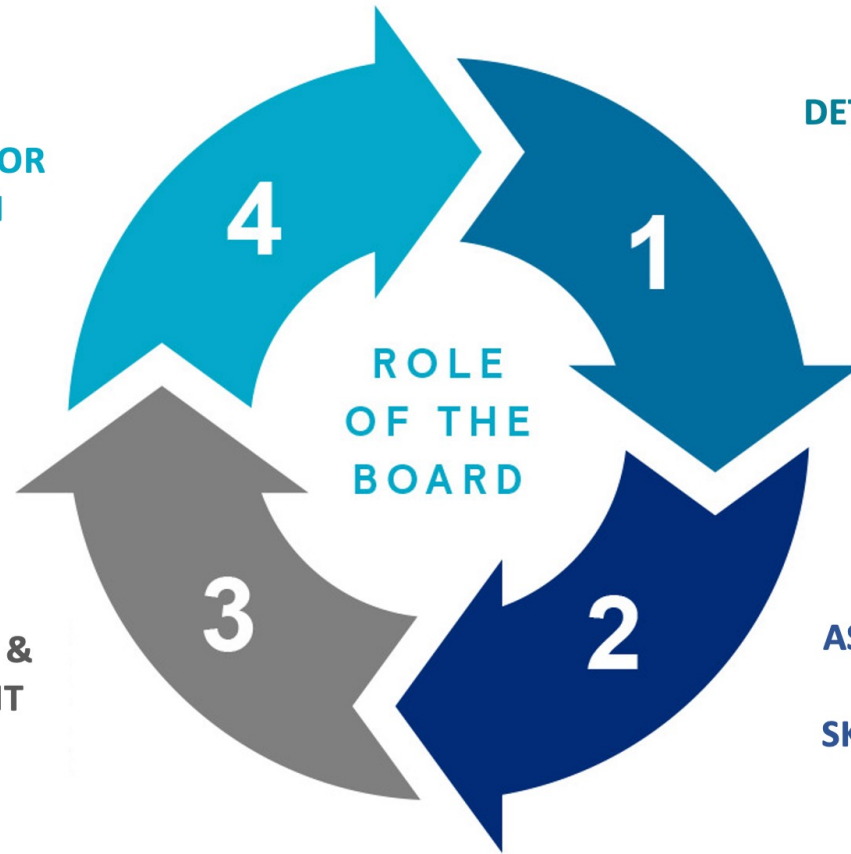
Continuous feedback from candidates



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# Readiness & Selection



## ANTICIPATE THESE ISSUES

Incumbent cloning

Length of learning curve

Alignment of personal & CWRT goals

Matching expectations with reality

Resistance to change

Support by persons of influence

Weakness in performance management

Rewarding wrong behavior

Lack of time



Discussion time..