

Embracing Leadership Transitions: A Best Practices Guide to Succession Planning

Succession planning is a proactive investment in an organization's future. A robust succession plan safeguards institutional memory, ensures seamless leadership transitions, and reinforces the organization's core values and mission. It is a strategic initiative that empowers the next generation of leaders, fosters resilience, and ultimately drives long-term success.



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Leadership transitions often evoke a sense of uncertainty, triggering concerns about redefined roles, cultural shifts, and the potential disruption of the organization's mission. Whether building your bench strength, planning for a phased retirement, or backfilling in an emergency, a proactive, well-structured, and responsible approach to succession planning empowers organizations to navigate these challenges and harness the opportunities that transitions present.

Here are some best practices to consider when developing a comprehensive succession plan:

Start Early and Make it Ongoing:

Don't wait until the last minute to start succession planning. Begin the process early in the CEO's tenure and treat it as an ongoing, iterative process that evolves with the organization's needs and goals.

Prioritize Diversity and Inclusion:

Actively seek out diverse candidates to bring fresh perspectives and experiences to the leadership team.

Involve Key Stakeholders:

Include the board of directors, employees, donors/ funders, and other key stakeholders in the succession planning process to ensure diverse perspectives and buy-in.

Align with Strategic Goals:

Integrate succession planning with the organization's overall strategic plan to ensure the future leadership has the necessary skills and competencies to execute the company's vision.

Consider Both Internal and External Candidates:

While developing internal talent is essential, also consider external candidates to broaden the pool of potential successors and find the best fit for the organization's needs.

Assess Candidates Objectively:

Use a variety of assessment tools and methods, including performance reviews, personality assessments, and structured interviews, to evaluate candidates objectively and mitigate bias.

Invest in Leadership Development:

Provide potential successors with targeted development opportunities, such as coaching, mentoring, training, and stretch assignments, to prepare them for leadership roles.

Communicate Transparently:

Maintain open and transparent communication with potential successors and key stakeholders throughout the process, providing regular updates on progress and expectations.

Establish Clear Metrics:

Define clear metrics and evaluation criteria to measure the effectiveness of the succession planning process and track progress over time.

Regularly Review and Update the Plan:

Succession planning is not a one-time event. Regularly review and update the plan to reflect changes in the organization's strategic goals, external environment, and the development of potential successors.