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# Orderly Succession

## From Planning to Onboarding, And All Stops in Between

A discussion guide for the

Association Forum of Chicagoland

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No organization consciously sets out to compromise its future. So why do so many associations admit to doing a poor job of planning for one of the most critical factors in future performance: executive leadership succession?

Whether it involves the CEO or any other member of the executive team, continuity in effective leadership is key to sustained superior performance. That means having a solid plan in place for succession — a thoughtful, structured and disciplined approach to identifying evolving leadership needs and requirements… talent identification and development… effective search and recruitment… and not the least, successful onboarding to assure success by individual leadership team members.

## Continuity in effective leadership is key to sustained superior performance.

How do leading organizations work to assure a consistency and continuity in leadership — not just the quality of leadership needed to drive top operational performance, but continuity in the organizational brand that sustains active, unwavering support from its various stakeholders and supporters? What are the key elements of effective executive succession planning — and execution?

Most successful succession planning is built around four guiding principles.

■ **Serious reflection and clarity of objectives**. This bedrock element of planning involves less a catalogue of job descriptions than a rigorous process of reaffirming the organization's goals and objectives, and the various skills, experience and capabilities needed for each leadership post in that framework.

■ **Development planning**. What talent is available to us? How does that talent need to be further developed? How do we bring the best of the best along, or know when we need to look beyond the talent roster we already possess?

■ **Objective assessment — and recalibration**. Are our potential leaders growing and developing the way we want? What do we need to do to improve the growth process? When do we know we're succeeding, or failing? When do we know if we need to start looking to the outside? How do we make sure that in making our choices, we hold firm to the real objective: finding the required caliber of leadership?

■ **A bias for success**. How do we do everything we can to speed the integration of new leaders into the organization, and optimize their chances of success? How do we speed this process along, to assure we maintain high performance levels now and into the future?

As any experienced executive search professional will tell you, the magic in succession planning lies in dealing with the practical questions that arise in trying to adhere to those principles. Very often, those practical matters also seem to fall in a group of predictable areas.

## Maintaining Focus

Succession planning is a critical element of good management and sound governance. But it doesn't have to be a painful ordeal or cause for sleepless nights. Following proven fundamentals provides a workable approach for this important task. And coupled with the right effort to apply those fundamentals to crafting a plan customized for your specific employer brand, it can be a constructive continuous exercise in maintaining organizational focus and optimizing performance, now and for the long-term.

## Succession planning is a critical element of good management and sound governance.

Losing focus most often occurs from a lack of planning rather than the plan itself. Organizations are most

at risk of losing focus and going off track when succession becomes an emergency exercise, or a necessity generated by events, rather than a normal, on-going element of effective management and governance.

## Defining Core Competencies

What skills are critical for each executive position? How is the mix of critical skills changing? How are those skills evolving? How well do we really understand what competencies will most affect the ability of an executive to achieve the individual and organizational performance standards?

These aren't questions to be posed — or answered — in haste. They require reflection and serious analysis, on the basis of experience and insight, wherever it may be found. They also are questions that must be asked not once but regularly, in step with the dynamic nature of the marketplace and environment in which the organization operates.

## Thinking Business First

The concept of the 'employer brand' provides an excellent platform for thinking about succession issues. How effective is our approach to recruiting, retaining and developing our top leaders and key personnel? Does our approach truly capture the distinguishing elements of our employer brand? Are our recruitment efforts aligned with the distinctive qualities that define our unique brand? Is our brand's commitment to diversity and inclusion accurately

reflected in our overall approach to recruitment?

How do we honestly evaluate our internal candidates — their potential for growth, and more important, their developmental progress? How good are we at recognizing when people cannot develop further in our organization, and should be guided toward other career paths and opportunities? How do we avoid personal bias, admit mistakes, or if necessary accept the need to look elsewhere?

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**The purpose behind succession planning is not simply organizational continuity but sustained achievement of organizational goals.**

The purpose behind succession planning is not simply organizational continuity but sustained achievement of organizational goals — whether those goals involve size, growth, member support, political presence and influence, or any other metric of success defined by the organization. Succession planning is a principal responsibility of good management and sound governance. Its purpose is the on-going success of the organization, with matters of personality, relationships and personal preference made secondary to this fundamental objective.

## Authentic vs. Formulaic Onboarding

How do we make onboarding something more than a business cliché?

How do we craft an approach for each executive position that gives those individuals the maximum opportunity for fast and lasting success?

This is an increasingly critical element of succession planning — and one most easily overlooked or given inadequate thought. Success in this area depends largely on recognizing the difference between *authentic* onboarding and *formulaic* onboarding.

Onboarding for some organizations is little more than a checklist of mechanical steps to take, mostly focused on the trappings of *working within* an organization rather than the substance of being *fully integrated* into one. It's a checklist of actions — order business cards and stationery, assign a new parking space, conduct a walking introduction to staff, issue a staff directory and bound copy of policies and procedures, assign a mentor.

Checklists and mechanical steps may provide a framework for beginning the onboarding process. Authentic onboarding builds on that framework to customize the process to reflect the employer brand, and to fit the individual and the organization like a high-quality pair of gloves. Fit is so critically important.

It goes beyond understanding policies and procedures — to the day to day mechanisms that make the wheels of the organization turn on a regular and steady basis to produce the practical necessities of doing business. It goes beyond what all too often passes for simple mentoring and personal coaching — more than just answering questions, helping solve problems, or sorting through policy and procedures.

Authentic onboarding demands attention to every aspect of the employer brand. It emphasizes the importance of working hard to assure a cultural fit — a grasp of norms and behaviors, personalities, the unofficial and informal ways things get done. It means attention to the way of doing things going beyond the mechanical — for example, the values shaped by history and force of personalities, and how they affect any leader's ability to accomplish the important goals and fulfill the larger responsibilities that come with an executive title make a difference. This is mentoring and coaching not by the numbers but with commitment and continuous support — personal, attentive, honest and constant.

This aspect of executive onboarding requires a mentor or coach — or a team of mentors and coaches — with particular skills and capabilities. It demands people who know not just the evolving technical and professional skills critical to top performance but also are masters of the organization… know its culture… know how things get done… know the lens through which individual actions and words are seen and judged by peers, subordinates and superiors. Authentic onboarding places a premium on involving mentors and coaches and colleagues with the interpersonal skills, judgment and temperament to convey all those complex elements, in a timely and constructive manner. That is real onboarding, rather than formulaic onboarding.

Classical economists talk of the 'invisible hand' that guides the market. With executive onboarding, real mentoring and coaching provide exactly the same kind of unseen yet pervasive guidance in speeding the process of true integration into the operation and culture of the organization.
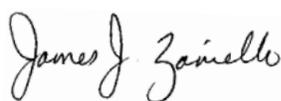
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