

Succeeding with Succession



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Everyone agrees that succession planning is one of the CEO's and board's most critical responsibilities.

In fact, a [recent Bridgespan article](#) highlighted it as by far the No. 1 organizational concern for US nonprofits. Yet all the studies suggest that nonprofits and their boards grossly neglect this all-important task. What is the disconnect?

In our experience at [AchieveMission](#), many nonprofit leaders avoid succession planning because of the anxiety and painful misunderstandings they fear it will create. And, this high emotional charge rests, in turn, on prevalent misunderstandings about succession planning.

If your organization needs a new or stronger succession plan, the key to success is to acknowledge the anxieties that you and other stakeholders may have and reframe your understanding of succession planning. Tackling these hidden obstacles will create the conditions for you to reduce anxiety, smoothly move your succession planning forward, and produce a palpably stronger organization.

Acknowledge Others' (and Your Own) Anxieties

While many of the anticipated fears associated with succession planning may be unfounded, the feelings are very real. Whether you are the CEO or a board or staff member, it is essential to patiently listen for and validate these concerns before trying to move forward. Here are some typical examples.

CONCERNS ABOUT SUCCESSION PLANNING			
	CEO	Senior Staff	Board
Initiating succession planning by CEO/senior staff/board will ...	<ul style="list-style-type: none"> • Be misinterpreted by the board as an invitation to be replaced before the CEO is ready to leave • Cause board members and staff to worry that the CEO is unwell or going to leave • Call to question the CEO's personal feelings about mortality, especially if retirement is on the horizon 	<ul style="list-style-type: none"> • Be misinterpreted as disloyalty to the CEO or as jockeying to succeed the CEO 	<ul style="list-style-type: none"> • Be misinterpreted as the first step to firing the CEO, and cause staff and other stakeholders to worry • Upset the CEO and call into question the loyalty to the CEO of one or more board members (especially true if board includes friends and family)
Doing the work will ...	<ul style="list-style-type: none"> • Take too much time and require skills the CEO does not have • Lead to infighting and political jockeying among potential successors 	<ul style="list-style-type: none"> • Be perceived as lack of loyalty to the CEO and other leaders • Lead to infighting and political jockeying • Take too much work without the needed skills 	<ul style="list-style-type: none"> • Require expertise, networks, and time that the board lacks • Lead to infighting and political jockeying
Having a succession plan will ...	<ul style="list-style-type: none"> • Make the CEO "replaceable" and cause the board to consider the CEO's replacement • Include naming a successor and make the CEO a lame duck 	<ul style="list-style-type: none"> • Lead to new expectations of staff and other potentially threatening changes 	<ul style="list-style-type: none"> • Include naming a successor and make the CEO a lame duck • Lead the CEO to feel replaceable and consider leaving, opening up challenges and risks the board would rather avoid

As you acknowledge your own and others' concerns, identify the assumptions that drive them. You may find that many of these are based on misunderstandings about succession planning, and that a reframing of what it is all about will help quell these anxieties and enable you to make progress.

Reframe Succession Planning to Address Concerns

Anticipating and reframing the key dimensions of strategic succession planning will shift emotional reactions and align the team.

MISUNDERSTANDINGS ABOUT SUCCESSION PLANNING		
Dimension	Common Misunderstandings	Best Practices
What is the output of a succession plan?	<ul style="list-style-type: none"> The naming of an agreed-upon successor to the CEO A one-page document that provides passwords and access to bank accounts 	<ul style="list-style-type: none"> Annual, structured review of performance and promotion potential Creation or updating of succession pipelines for existing and anticipated critical roles, including internal and external candidates Corresponding action plans to retain, develop, and/or bring these individuals closer to the organization so as to make them viable candidates Creation of individual development plans consistent with succession path potential
Who is included in succession planning?	<ul style="list-style-type: none"> CEO 	<ul style="list-style-type: none"> All or most staff and board
Why do succession planning?	<ul style="list-style-type: none"> Address problems with performance Plan for imminent departure Respond to crisis 	<ul style="list-style-type: none"> Create a stronger organization with stronger leadership and talent Identify where the organization needs to develop and/or recruit talent in order to achieve its mission goals Ensure that individual development plans align with organizational succession needs Create stronger motivation for staff and their managers to develop talent
When do you do succession planning?	<ul style="list-style-type: none"> Precipitated by crisis: i.e., when there is a dismissal or voluntary but unanticipated departure 	<ul style="list-style-type: none"> Annually and ongoing
How do you do succession planning?	<ul style="list-style-type: none"> Through closed-door meetings 	<ul style="list-style-type: none"> As part of a human capital management system, integrated with performance management and professional development, implemented with transparency and inclusion

With best practices in mind, you are in a position to anticipate and respond to questions and concerns about succession planning. Create space for skepticism (Are you being honest with us?) and rumors (Is the board unhappy with the CEO?) to be voiced and addressed. Be forthright about the challenges you will need to face, e.g., learning how to conduct succession planning sessions and write development plans, while reassuring the team that, with practice, the process saves time and provides benefits that will accrue to them, the organization, and its mission.

The Succession Planning Conversation Agenda

Here's a practical script that integrates the two sections above. It's applicable with some modification to use by any of three roles: staff, CEO, and board.

1. Express enthusiasm for succession planning, tempered with acknowledgement of possible concerns and misunderstandings.
2. Invite questions and concerns. Just acknowledge and note at this point. Use the "Concerns about Succession Planning" table above to probe, especially if people are reluctant to share.
3. Discuss definitions of and prior experiences with succession planning in other organizations. Use the Common Misunderstandings column in the "Misunderstandings about Succession Planning" table above to probe, especially if people are reluctant to share.
4. Ask the team to work back from their prior experiences and assumptions to their questions and concerns about succession planning.
5. Suggest that an alternative concept of succession planning is possible and ask, What will happen if your understanding changes?
6. Explain the new succession planning process using the "Misunderstandings" table:
 - a. What
 - b. Who
 - c. Why (benefits)
 - d. When
 - e. How
7. Discuss
8. Align and move forward

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AchieveMission is proud to collaborate with Bridgespan on topics related to leadership development and human capital management. Please also see [Human Capital Management: Don't Reinvent the Wheel](#), [Measuring the ROI of Human Capital Management](#), and [How to Recognize—and Fix—Human Capital Management Issues](#).

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