

A OCCURS WHEN KEY MEMBERS OF THE SENIOR MANAGEMENT TEAM CHANGE, RESULTING IN TURNOVER OF THE KNOW-HOW AND EXPERIENCE REQUIRED TO ENSURE CONTINUITY AND STRATEGIC SUCCESS OF THE ORGANIZATION.

To develop an effective plan it is helpful to begin by recalling your own experience.

- DID YOU HAVE AMPLE OPPORTUNITY TO MEET WITH YOUR PREDECESSOR?
- DID YOU PARTICIPATE IN AN ORIENTATION?
- WAS THERE A PROCESS FOR YOUR QUESTIONS TO BE ANSWERED?

- WERE YOU GIVEN THE NECESSARY CONTACT INFORMATION YOU NEEDED TO CARRY OUT YOUR DUTIES?
- WERE YOU INTRODUCED TO THE STAKEHOLDERS WHO WOULD ASSIST YOU WITH YOUR SUCCESS?

- WERE YOU ADEQUATELY INFORMED OF THE CHIEF DUTIES OF YOUR POSITION PRIOR TO ASSUMING IT?
- DID YOU HAVE A CLEAR SENSE OF THE PRIORITIES OF YOUR ROLE?
- WERE YOU MADE AWARE OF THE KEY DOCUMENTS REQUIRED TO CARRY OUT YOUR DUTIES?

These issues can be summarized by asking the question: *Were you given the best possible preparation for entering your role on the leadership team?* By examining these areas, you can – in collaboration with the rest of the leadership team – design an effective Leadership Transition Plan for the next generation. This will optimize your organization’s position for success.

An effective transition is a powerful way to pass on your legacy as a leader. Done well this change in power is more than passing the torch, it is an opportunity for you to meet the new team face-to-face, look them in the eye and ensure that the vision of your organization’s future is carried forward.

No act of good will or sincere intention will replace preparation. By identifying the most critical components of your legacy and communicating them to the new team with passion and professionalism, you put them and the organization in the best possible position.

By giving forethought to the tools and knowledge required to make the transition effective, you will go along way toward ensuring success. Ideally this will take place with the entire leadership team present, so that important linkages and dependencies can be identified.

Here are some questions to consider:

- ∞ What documents have been critical to your success?
- ∞ How did you find the experts you depend on? Is there a directory you can pass on?
- ∞ What annual activities are the most important to your organization’s success?
- ∞ What have been your toughest lessons?
- ∞ Can you identify Best Practices for you personally?
- ∞ What worked well for you as you learned the ropes?
- ∞ What would you do differently to ensure the success of the next team?
- ∞ What documentation can you provide to optimize the next generation’s success?

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_____ YES, I DID. _____ NO, I DID NOT. Thoughts for improvement:

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RESOURCES:

[PLANNING A LEADERSHIP TRANSITION](#) BY

[THE CHALLENGE OF LEADERSHIP TRANSITION](#) BY FRANCES HESSELBEIN

[MANAGING TRANSITIONS](#) BY WILLIAM BRIDGES