

## Executive Transition Management Services

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## ETM...Executive Transition Management

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o ETM recognizes that

- Change is coming
- Change can be hard
- Change offers a unique capacity building opportunity
- Nothing is constant but CHANGE

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## ETM...Executive Transition Management

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o Designed to build capacity...includes..

- **Succession Planning**
- **Preparation**
- **Recruitment and selection**
- **Post hire activities**

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**ETM...Executive Transition Management**

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- **ETM** is different than Executive Search
  - **Executive transition** is the entry point for broader capacity building
    - Need to pay special attention to founder and long-term leader executive transitions
    - Board and Executive have to approach this as a TEAM....both have a lot to gain..or loose!
    - Cannot ignore customers (internal and external) as a part of the process and having investment in the outcome

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**ETM...Executive Transition Management**

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- **Influencing factors**
  - Organization health and life cycle
  - Organization size (staff, budget)
  - Diversity considerations (who/what will "fit" the organization in the future)
  - Departing executive's role, legacy and shadow (charismatic leader)
  - Circumstances of the departure

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**Executive Transition Management Process Overview**

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**Preparation for ENDING**

- Succession Planning
- Transition Search and Planning

**Changing ....NEUTRAL ZONE**

- Transition Coaching or Comprehensive Transition and Search

**Thriving ..moving on to the NEW**

- New Executive Launch Support

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**LEADERSHIP TRANSITION....**

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- *The leaving of the key leader, and includes the period before, during and after the departure*

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**Leadership Succession**

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**The strategy to sustain capable leadership through various leadership transitions**

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**SUCCESSFUL SUCCESSION**  
.....The desired result.....

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- **Effective sustainable and strong organizations in the non profit sector**

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**Strengthening Organizations During Leadership Change...**

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**Two Key Strategies.....**

- **Executive Transition Management**
  - For the Executive/CEO
- **Succession and Sustainability Planning**
  - For Staff leadership
  - For Board Leadership
  - For the organization
  - For the customers, community

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**ETM...Executive Transition Management**

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o **Transition challenges**

- Insufficient salary to attract new leader with skill set needed to carry forward
- Reenergizing staff who are used to leader
- Organization may need to "re tool", may have peaked under departing Executive
- Creating a new leadership style
- Getting rid of departing Exec's "shadow"

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**ETM- Influencing Factors**

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- o **Organization health, life cycle and size**
- o **Organization mission and culture**
- o **Diversity considerations**
- o **Departing Exec's role, legacy and shadow**
- o **Circumstance of the departure**

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### ETM- Influencing Factors

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- **Succession Planning** enhances the ability of an organization to withstand planned and unplanned changes in leadership
  - A **short term** focus on replacing talent (emergency succession plan)
  - A **longer term** focus on leader development to ensure a pipeline of talent for various leadership roles

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### Succession Planning Entry Points

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- **Emergency Succession**
  - Try to avoid...can destroy an organization...leaves doubts and fears
- **Strategic Leader Development and Succession Planning**
  - Takes time, a plan of action, involvement
- **Departure defined** succession
  - Results in a sustainable organization

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### For Planned Transitions.....

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- **Succession Planning** provides opportunities for the outgoing leader to...
  - Come to terms with legacy
  - Implement focused activities to strengthen staff and organizational capacity
  - Have a strategic impact

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**Keys to Sustainability**

- Clear purpose and direction
- Leadership and competencies
- Effective Systems and processes
- Strong, healthy relationships
- Resources to achieve goals

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**Transition... Coming to terms with change...**

- The **ENDING.....**
  - Loss, letting go, relinquishing "old way"...
- The **NEUTRAL** Zone
  - Confusion, direction finding, re-patterning...
- The **NEW** Beginning
  - Commitment, rebirth, new energy, new sense of purpose

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**ETM....desired outcome**

- When assessing an organization's effectiveness in **MISSION** accomplishment
  - ..there is a link between organizational effectiveness and sustainability
  - ...assistance from trained ETM consultant is key to a smooth process

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**ETM...Consultant can....**

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- Assist Board in organizing and managing an ETM Committee and the process
- Conduct an organizational assessment
- Facilitate a Strategic Review and Leadership Planning session with Board
- Develop a process for recruiting and selecting new leadership
- Assist the current leader with transition
- Help plan the launch for new leadership

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**ETM...Consultant can offer....**

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- **Succession Planning** with departing Executive and key staff
  - 5 - 10 hours
- **Agency assessment** , new position development and community engagement
  - 40 – 50 hours
- **Executive search** and screening process/ assistance
  - 50 – 60 hours
- **Post hire assistance** to Board and new Executive
  - 10 – 20 hours

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**ETM.....desired outcome**

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- Leadership capacity to facilitate

**Effective  
organizational  
performance and  
Mission  
accomplishment**

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