

Two mistakes in CEO transitions – and three best practices

by Kathy Bremer

You've just wrapped an intensive search process. A dynamic new CEO, with the right assets for the challenges and aspirations of your organization, will start in a few weeks. Congratulations!

Now what?

Everyone exhales and thanks the committee for its fine work. There is a collective sigh of relief. *That's solved.*

Two common mistakes

One or both of the following responses can hamper the CEO's successful transition and tenure:

- Adopting a “CEO will fix” mindset. The Board should address whichever thorny issues it can without constraining the new CEO. If you overcome the natural tendency to await the CEO's arrival and act on personnel, budget or other issues that would needlessly consume the new CEO, you will speed his or her path to the bigger opportunities.
- Underestimating the time required to build trust and fully grasp the organization, its people and challenges. No matter how knowledgeable or close to the organization your new CEO is, she or he will face a steep learning curve starting on day one. Trusting relationships, essential to a leader's ability to make things happen, take weeks or months to build. So does a nuanced understanding of the organization's realities and opportunities. If the departing CEO lingers, that will slow the transition process.



Three best practices

Even as the search committee is receiving its rightful accolades, your Board should be doing three things to facilitate the new CEO's successful transition:

- Creating a transition committee and plan. The transition committee, often a subset of the search committee, functions as the CEO's sounding board, ally and guiding body over the first few months. Working with the search firm and incoming CEO, the transition committee should lay out a six-month onboarding plan that addresses specific opportunities for the new CEO to build relationships with staff, the Board and external constituencies (donors, partners, media) as well as goal setting, strategic planning and personal development opportunities.
- Making personal introductions to key constituents. The plan should include specifics about the organization's important relationships, and the Board members who will make introductions. Introductions can take the form of one-on-one visits or hosted events. These are critical to bringing the new CEO into the fold, and to the organization's future support.
- Analyzing the CEO's strengths--*and* the areas where she or he will need support. In anticipating the arrival of a strong leader, it's easy to overlook areas of lesser strength and the new CEO's need for ongoing personal development. Often, a wise friend of the organization, possibly a former Board member, can be a helpful mentor and sounding board. A leadership workshop with 360 feedback and coaching, or an immersive fundraising or nonprofit management course, can be additive. Investing in the CEO's growth will boost results. This commitment should be baked into the upfront transition plan.

In BoardWalk's experience, a strategic, thoughtful transition process makes a significant difference in the critical first months of a new CEO's tenure -- setting him or her up for success over the long haul.

What experiences have you had with transitions—positive or other? Share your ideas and experiences, and we will include them into a future article.

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