



Five Tips on Transitioning from an Iconic CEO

by Kathy Bremer and Ayanna Hunt

The arrival of a new CEO is a chance to welcome new ideas, possibilities and energy. But when the new leader follows a beloved, long-serving predecessor, successful transitioning is a challenge.

BoardWalk recently invited a group of nonprofit CEO's and board leaders to discuss their experiences with such challenging leadership transitions. Several of the leaders had followed an iconic CEO, and others had board-level experience helping a new CEO transition and gain traction.

Here are their tips for board leaders and successor CEO's:

- 1. Recognize and build on positive legacies.** Identify and codify a handful of the former leader's stories, beliefs and ways of doing things that are valuable for the organization going forward. If you do that, changing other things will be easier. Keeping the predecessor in the family, and inviting her to special occasions or to play a specific role, reinforces the organization's strength and continuity.

Example: One retired CEO took on the mandate of re-engaging former board members and donors.

- 2. Have the new leader's back.** The board needs to fully and unconditionally support the new leader. The chair needs to communicate to staff the reasons the board selected the new CEO, and the expectation of staff's full support.

Example: One board chair thoughtfully briefed the staff and helped them imagine an inspiring future with the new CEO. In the process, he let staff know that if someone cannot get fully on board, moving on is OK.

- 3. Embrace a "new normal."** The previous "normal" is the only norm the staff knows—they have been accustomed to doing things a certain way for a very long time. By-products of a long-serving CEO can include:

- A board that has been managed in a certain way, and has learned to shy away from aspects of its governance role.

- Senior staff that has relied on the CEO for problem-solving and is unaccustomed to stepping up.
- Silos—people working in their “comfort zone” and “respecting boundaries” rather than insisting on teamwork and wrestling with doing things better.
- Assumptions that issues are “settled” -- leading to fewer ideas and challenges to the status quo, less innovation and honest communication.

With the board’s support, the new CEO needs to invite people to develop a “new normal” together.

Example: A new CEO sparked energy and fresh thinking by challenging the team: “If we were starting from scratch, how would we do this?”

- 4. Shine a light on elephants in the room.** Transitions cause anxiety. Addressing what’s on people minds, with transparency and directness, increases trust and readiness for change. Before and during the search, demystify the timing and process for senior staff, and invite input on CEO assets. Be clear that the goal is recruiting a leader for the organization’s next aspirations and challenges, not replicating the departing CEO. Show appreciation for an internal staff member who applies but is not selected.

Board example: One chair met with the unsuccessful internal candidate to clarify assets the new CEO would bring, and why that leader was selected. Together with the new CEO, the chair crafted a new mandate for the individual, who became excited about staying with the organization.

CEO example: The new CEO said out loud, “I’m not trying to replace ____, I’m trying to run the organization and advance the mission we all care about.”

- 5. Starting today, get ahead of the succession curve.** Address the question, for the CEO and other senior roles, “If so-and-so were to depart, who can quickly succeed her?” If no one comes to mind, begin to proactively groom someone through mentoring, collaborative assignments and training. In nonprofits, lean budgets constrain staff depth, so knowledge can be held by a single individual. When that person leaves, the knowledge leaves. Put processes in place that socialize knowledge and de-silo the organization.

Example: One CEO required each manager to identify a strong potential successor and implement a plan for his development.

What have your experiences been in making the transition from an iconic CEO? Whether you are a board or staff member or one of the CEO's directly affected by the transition, we'd like to encourage you to share your experiences with us via [email](#).¹ We will include the lessons learned, scrubbed of any identifying data, in a follow-up piece.

Kathy Bremer is Managing Director and Ayanna Hunt is Research Associate at [BoardWalk Consulting](#)², a firm committed to "finding leaders that matter for missions that matter"[®]

¹ info@BoardWalkConsulting.com

² www.BoardWalkConsulting.com