5 Critical Conversations in Succession Planning

When the topic of succession planning first landed on my radar (early 2007) there were very few ministry leaders that would entertain the conversation. This was true at both the denominational and local church level. There just wasn't a sense of urgency on the topic. Fast forward to 2016, and the tone has changed considerably.

As this conversation has come to the forefront of leadership thought and conversation I have noticed a concerning pattern develop. **The term "succession planning" is being used as a catch phrase for what is actually five distinct conversations.** This creates a challenge in implementation as there are multiple agendas attached to the same word.

To bring clarity to this conversation we are launching a series that brings codified language to to help distinguish what people mean when they reference "succession planning."

Here are the five different conversation of succession planning.

- Succession Planning as **Protecting Organizational Continuity**
- Succession Planning as **Emergency Transition Management**
- Succession Planning as **Leadership Pipeline Development**
- Succession Planning as **Proactive Exit Planning**
- Succession Planning as **New Leader Hiring**

Succession Planning as **Protecting Organizational Continuity**

When navigating a intentional leadership transition careful thought and energy is focused into what I refer to as the "7-Year Window." This is the period of time that extends anywhere from 3-5 years before the current leader formally transitions to 2-4 years after. The time preceding the current leader's formal transition is spent planning, preparing and implementing a transition strategy. The time frame after the formal transition date is focussed on settling into life with a new leader.

A brief survey of ministries in the "Succession Planning as Protecting Organizational Continuity" reveals several high level questions that ministry teams wrestle with. Here are five of the fifteen most commonly asked questions during this time.

- Do we have a clear sense of what makes us unique?
- Do we need to address issues related to our governance structure?
- What impact will the transition have on our giving?
- What is the best way to involve our people in the process?
- How can we ensure the successor starts well?

Succession Planning as **Emergency Transition Management**

Emergency Transition Management is a formalized process of making key decisions before an unplanned transition presents itself. I estimate that 80% of the decisions that need to be made in the wake of an unforeseen transition can be decided ahead of time with the right tools in place.

Succession Planning as **Leadership Pipeline Development**

Most secular organizations use the phrase “succession planning” almost exclusively to reference their process of identifying and developing employees that have potential for increased levels of responsibility. Leadership development in a nonprofit context is generally weighted towards equipping volunteers to manage various aspects of program implementation. Increasingly, local churches are focussing on building a leadership culture that equips people to serve both inside and outside their programming structures.

Succession Planning as **Proactive Exit Planning**

Exit planning conversations in the business world tend to revolve around issues related to asset valuation, ongoing ownership structures, and liquidity events. In a nonprofit setting, both secular and sacred, exit planning revolves around funding deferred compensation and determining what a key leader’s area of focus will be once they have transitioned out of their current role. This often involves developing a platform to facilitate ongoing coaching, mentoring, or consulting activities.

Succession Planning as **New Leader Hiring**

Ministry leaders often use succession planning as a reference to the search process. Efforts here focus on the developing a profile, identifying and vetting candidates and negotiating offers. Some churches will engage in a professional search firm while others will manage the process on their own.

Many Elders and 2nd Chair leaders feel uneasy about talking with the Senior Leader about their eventual retirement. Conversely, many Senior Leaders become very defensive when the topic of “succession planning” is mentioned in reference to them. This is often tied to the fact people are defining succession in terms of search. In my experience, having language that allows the succession conversation to shift from “search” to “Intentional Leadership Transition” or one of the other three conversations highlighted is all that is needed for the senior leader to engage the process.

Read more from Will.

Do you have questions about starting the succession planning conversation? Talk with an Auxano Navigator to learn more.