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### Start with the *Why*

- ▶ Why do I want this?
- ▶ Why do I think this new situation will make my life better?
- ▶ What might the downsides or risks be?

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### Get Clear on the *What*

- ▶ What does this new job or lifestyle look like?
- ▶ What does it not look like?
- ▶ If it's a job change, are you going to be able to leverage your skills, your contacts, and your professional brand to make a successful transition?

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### What's it Going to Take?

- ▶ Are you lacking certain skills you need to be an attractive candidate for this new type of role? Certifications? Licenses?
- ▶ Taking on-line courses, gaining baseline proficiency.
- ▶ Is your family on board?

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### Make an Action Plan

- ▶ What is your primary goal?
- ▶ What is your timeline?
- ▶ Skills you need to acquire.
- ▶ People you need to meet.

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### Make an Action Plan

- ▶ Things you need to wrap up in your current job.
- ▶ Assign yourself daily or weekly tasks.
- ▶ Achieving small steps gives you momentum and confidence.

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### Track the Effort

- ▶ Monitor how you're doing and what you need to be doing next.
- ▶ Set up reminders so you follow up on things when you need to.
- ▶ Excel spread sheet, tablet with lists, or tool that makes the most sense to you.

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### Shift Your Brand

- ▶ You may need to shift your professional brand so your target audience “gets” you and sees you as a match.
- ▶ Make it “smack-in-the-head” obvious on your resume, your LinkedIn profile, your cover letter – why you make perfect sense for the roles you want.

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### Shift Your Brand

- ▶ If you want to work as a community advocate, but are a hospital worker on paper – you won’t get the job. Always tell the truth, but connect the dots about how your training and experience (professional and volunteer) make you a great fit for the community advocate position.

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### Mobilize Your Posse

- ▶ If you’re still employed elsewhere, you may need to be a little covert.
- ▶ Pick your most trusted contacts and enlist their help.
- ▶ Be specific – spell out what you need.

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### Get in Cahoots with the Right People

- ▶ Get to know passionate and successful people working within your new field of interest.
- ▶ Build rapport, then ask for a bit of time.
- ▶ Thank everyone who gives you input and advice along the way.

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*I'm ready to start the next chapter of my life.*

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### #1 Lead the Organization/Program

- ▶ As a leader in transition, your role is going to evolve as the transition unfolds and as your departure date draws closer.
- ▶ Maintain a sense of control while encouraging greater engagement by your board/supervisor/team.

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### #1 Lead the Organization/Program

- ▶ Encourage the board/supervisor/team to step up and get engaged in the succession and transition planning process.
- ▶ Let the board/supervisor take charge of the selection of your successor.

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### #1 Lead the Organization/Program

- ▶ Support your board/supervisor/team in assuming more leadership, especially in preparation for its role in onboarding your successor.

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### Job #2 Prepare Yourself

- ▶ Commit to a date – Do you plan to make a change in a few months or a few years?
- ▶ Picking the date is necessary to anchor the planning, even if that date is a range, e.g., summer 2020.

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Job #2 Prepare Yourself

- ▶ **PROFESSIONAL TIMING** - For most organizations, there's never a "perfect" time for a leadership transition, only times that are better than others.

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Job #2 Prepare Yourself

- ▶ **PERSONAL TIMING** - Timing of retirement or getting a new job should take into account your personal life. Get a firm grasp on your financial future. Then develop an exciting, engaged future.

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Job #2 Prepare Yourself

- ▶ You'll do better if you're moving towards something new rather than leaving something behind.
- ▶ A post-career support network is crucial as is a regimen to maintain your physical health and well-being.

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### Job #2 Prepare Yourself

- ▶ Your transition out of the organization is a process, not an event.
- ▶ Embrace your leadership role even as you encourage management to step up on the search and transition.
- ▶ Prepare the way for your successor.

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### Job # 2 Prepare Yourself

- ▶ Simultaneously, you must encourage the effective management of the transition process without "controlling" it.
- ▶ You must ready yourself to let go of the organization.

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### Job #3 Prepare the Organization

- ▶ Is the organization sustainable in the face of your departure? Is the organization's viability tied to you being the CEO or Program Director?
- ▶ Can you ensure that you have one or more viable internal successors?

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### Job #3 Prepare the Organization

- ▶ Does your organization have smart, skilled leadership in place to carry it through the transition?
- ▶ Does your board/supervisor/team understand that the selection of a new leader is not just an everyday hiring decision?

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### Job #3 Preparing the Organization

- ▶ Will your board/supervisor partner powerfully and effectively with your successor, or do they micromanage or, conversely, too frequently defer to you? If so, what can you do to shift that prior to the transition?

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### Job #3 Prepare the Organization

- ▶ Do you have a senior management team in place with people who fit the current and future leadership needs? Do they understand the succession and transition process and are they prepared to embrace the transition?

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Communications Plan  
WHO TO TELL AND WHEN

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Determine the Timeline

- ▶ Timing of the departure announcement to the board/supervisor is often shaped by the level of trust you share.

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Determine the Timeline

- ▶ If there is a high level of trust, you may choose to share your decision with them and become early planning partners.
- ▶ If you think they may respond by trying to force you out prematurely, you might want to hold your disclosure until later.

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### Tell the Board/Supervisor

- ▶ Having at least a shell of an exit plan ready serves as an important reassurance. Make sure the board or supervisor knows you have a plan, but don't elaborate in a way that makes them think they have been left out of the loop.

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### Engage Your Team

- ▶ When to engage the senior management team depends on many variables. How much capacity needs to be improved within your current pool of employees? Will staff be distracted by jockeying to be the successor? Talk with the senior management team first, before other staff and stakeholders.

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### Alert Key Stakeholders

- ▶ Key stakeholders (major donors, coalition partners, critical referral sources, etc.) are told about the impending transition when the organization is ready to announce the recruitment process. If your approach to the succession planning is particularly public, then you may announce earlier.

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Alert Key Stakeholders

- ▶ **A List** – Personal visit in some cases, or phone call
- ▶ **B List** – Announcement letter from Board Chair, CEO, or supervisor
- ▶ **C List** – Informed via newsletter, media release, or social media

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Coming to Closure

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Managing Emotions

- ▶ Announcement disrupts basic human desire for status quo and continuity.
- ▶ Transition requires patience, forbearance and generosity.
- ▶ Too much communication is better than too little.

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## A Successful Handoff

- ▶ Create a solid exit plan that includes a positive handoff to transfer the reins to your successor.
- ▶ Seek meaningful encounters between you and your constituents that provide them with the space to feel they have closure.

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HOW LUCKY  
I AM TO  
HAVE  
SOMETHING  
THAT MAKES  
SAYING  
GOODBYE SO  
HARD.

\*\*\*\*  
WINNIE THE POOH

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