

# Board Talk: Putting Succession on the Table

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#successionplanning

@kabercomm



International Association  
of Business Communicators  
Leadership Institute



One of the things we often miss in succession planning is that it should be gradual and thoughtful, with lots of sharing of information and knowledge and perspective, so that it's almost a non-event when it happens.

– *Anne M. Mulcahy*

# *Chat Activity*

*Please share the following:*

**What does succession  
look like for your  
board?**



# Benefits of Succession Planning

- Promotes continuity
- Enables rapid response to people changes
- Identifies leadership gaps
- Provides time to replace specialized skillsets
- Boosts retention and morale

# STEP Up to Succession

- **S**ee the big picture
- **T**ake the time to do it right
- **E**ngage on every level
- Put **P**eople in your pipeline

*\*TIP:*

Invite  
incoming  
board  
members to  
observe one of  
your meetings

## STEP Up to Succession

- **See the big picture**
- Take the time to do it right
- Engage on every level
- Put People in your pipeline

# Tell Us How You Are Doing

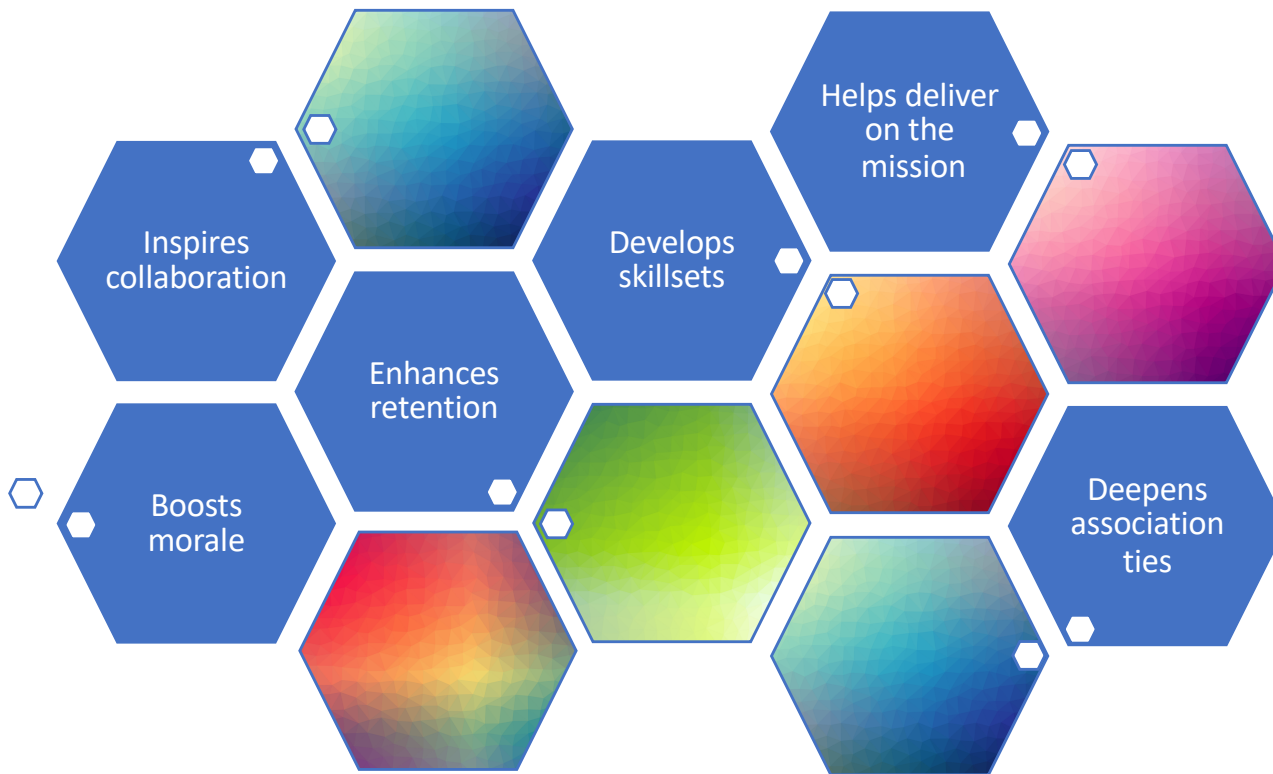
What percentage  
of your board members  
are FULLY engaged?

- 100 %
- 75 %
- 50 %
- 25 %
- < 25%

# Why is this important?







## Effective Board Engagement

# The Board Member Lifecycle



**Does the board get along?**

**Will this be a positive experience?**

**Will I have a chance to grow?**

**Will I be challenged?**

**Will I be empowered to make suggestions?**

**How effective is our board leader?**

# Team Culture



# STRONG vs Weak Culture



- Collaboration
- Open Communication
- Builds Confidence
- Highly Functional
- Increased Satisfaction



- Permission-based
- Lack of Communication
- Lack of Trust
- Heavy, precise process
- Productivity decreases

# Sustainability Stressors

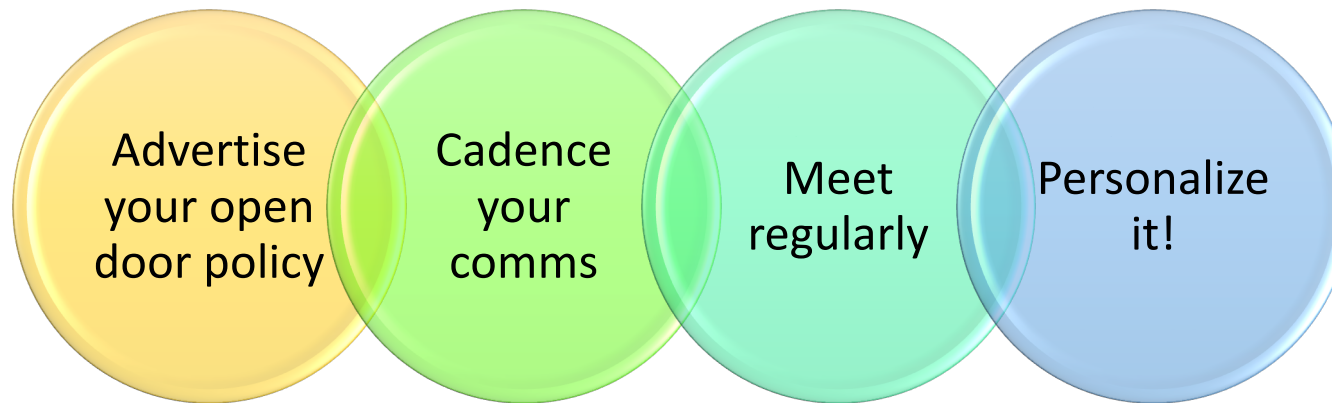
## Frustration Sets In

- Productivity Decreases

## Morale Suffers

- Team Members Disengage
- Retention Plummet

# Communicate to Keep Your Remote Board Engaged



*\*TIP: As a team, agree on communication response times*

*Chat Activity:*

Tell Us How You  
are Inspiring  
Your People

# Tell Us What You Are Doing

How often are you checking in with your board?

- Every day
- Weekly
- Monthly
- Quarterly
- Other



# Listen





*Chat Activity:*

What is your  
biggest  
succession  
challenge?

## STEP Up to Succession

- See the big picture
- **Take the time to do it right**
- Engage on every level
- Put People in your pipeline

# Start with a Plan

- Select your squad
- Review/revise selection process
- Identify gaps or expiring positions
- Develop position descriptions
- Share with current board and membership

# Place People Properly

- Promote opportunities and deadlines
- Schedule 1-1 conversations
- Assess needs, interests, wants
- Provide as much info as possible

# Engage 'em From the Start

- Assign mentors to check in regularly
- Prepare board binders
- Schedule a transition meeting, prior to turnover
- Plan and hold orientations

*\*TIP: Invite incoming board members to observe a meeting*



# Build Out Board Binders

# Keep Your Board Moving Forward

- Offer ongoing training
  - IABC Training (Leadership Institute)
- Schedule regular meetings
- Plan and hold retreat(s)
- Recognize everyone's efforts





**\*TIP:**

Assign mentors to check in regularly and provide support for new board members

## STEP Up to Succession

- See the big picture
- Take the time to do it right
- **Engage on every level**
- Put People in your pipeline

# Communicate Throughout the Board Lifecycle



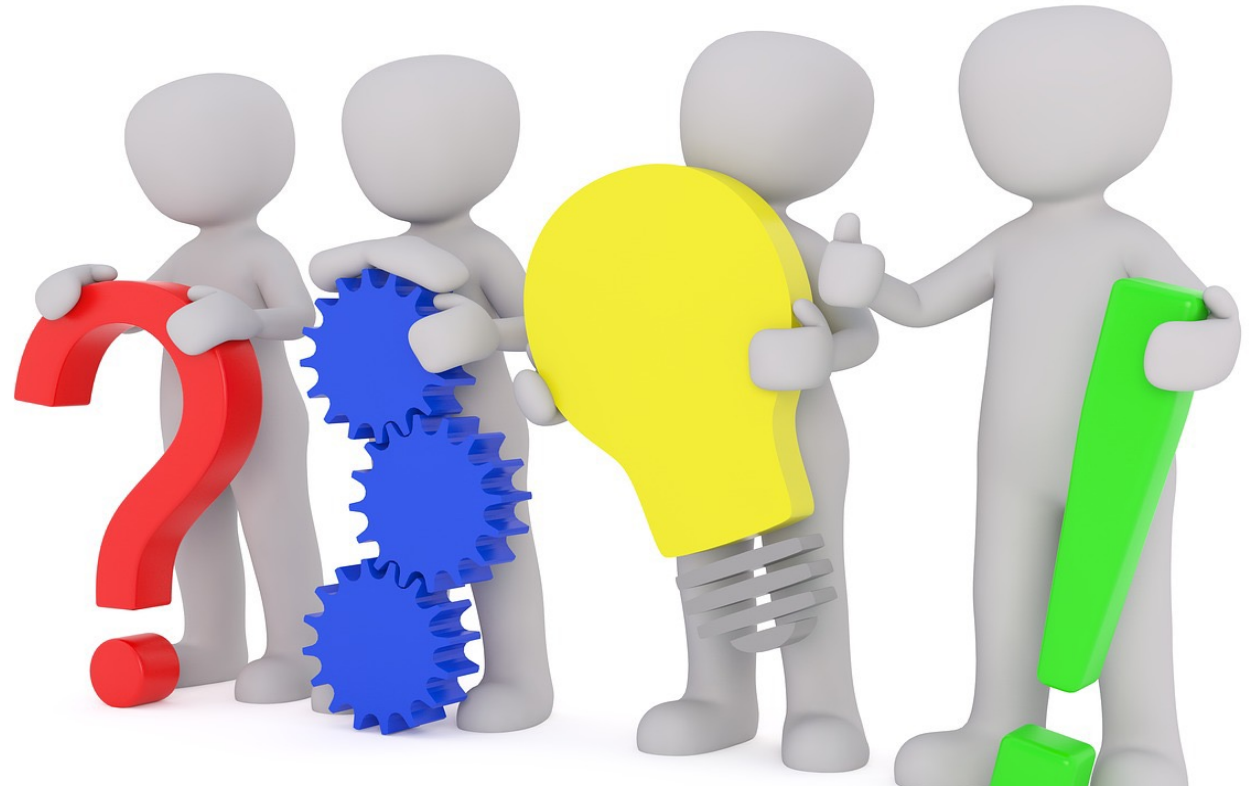
**We are a IA  
BC force  
for good  
in business  
and society**



**Tie Back  
to the  
Mission**

*Ask Your  
Board:*

**How did  
we do?**



*Chat Activity:*  
How do you  
recognize  
your board?





Share  
Your  
Impact

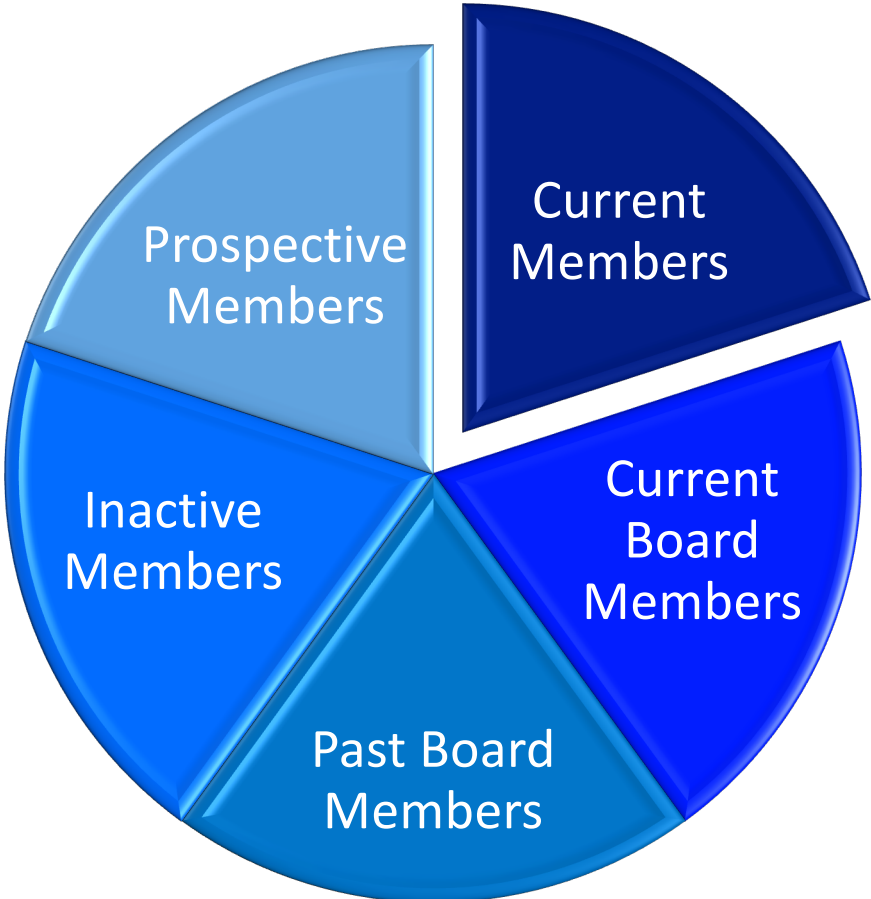
*Chat Activity:*

How full is  
your  
pipeline?

## STEP Up to Succession

- See the big picture
- Take the time to do it right
- Engage on every level
- **Put People in your pipeline**

# Key Succession Stakeholders





- Publicize openings and submission deadlines
- Emphasize longevity
- Focus on key roles
- Explain selection process

## Communicate Succession Planning

# Succession Planning Tips

- Identify potential leaders early on
- Look for interested, engaged members
- Together, identify opportunities of interest
- Provide training and mentorship support
- Lead by example – set term limits!

# Today's Takeaways

See the Big Picture

Consider the full board member life cycle

Take the Time to Do It Right

Recruit, engage and retain

Engage on Every Level

Elevate the board experience

Put People in Your Pipeline

Communicate succession planning



Thanks  
for all you do!

# Q&A

## Kaber Communications

*Changing the conversation around  
workforce engagement*

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