

## Succession transitions

In my work as an executive coach succession and the related transitions for the people on each side of the process are omnipresent. Yet much of the time neither the person trying to let go, nor the person wanting to step up, adequately understands what's involved in successful succession and the time it takes.

Successful succession takes years; it cannot be hurried. Whether it's a matriarch or patriarch letting go to younger family members, a CEO grooming one or more potential successors, or a senior partner transitioning her/his professional practice to a junior protégé, the patterns and ingredients of success are the same.

### Succession timeline

The timeline for succession takes anything from several years to more than a decade. In saying this, I am referring to planned, internal succession in a family enterprise, a professional services firm, or public corporation that believes in growing from within.

The succession timeline typically begins with a **master-apprentice** relationship (I use these words in a gender-neutral way). The master has accumulated wisdom, knowledge and relationships. The apprentice is *dependent* on the master to learn, grow and build relationships for them self.

As time passes, the dyadic relationship changes to one of mutual *inter-dependence*. The apprentice is no more, s/he is becoming their own person, growing out of the shadow of the master. They define their 'patch' on their own terms – but always within an envelope of mutual respect with the person they are starting to succeed.

And in the twilight stage of succession roles and dependence are reversed. The protégé now rules, while the master has let go. But the master does not have to ride away into the sunset. In many succession timelines, they remain, respected for their wisdom and contributing as a mentor and reservoir of institutional memory, tempering the exuberance of youth with the sagacity of age.

### Trust is essential throughout

Throughout the succession timeline, for the master to share their intellectual capital and relationships, which are sources of power and security, with their apprentice s/he must trust. Trust is also essential during the inter-dependence era to navigate the delicacy of changing boundaries as one steps away and the other takes over. And in the final stage, trust is the glue that holds the two together.

To trust each other, the players must have faith in two things:

- ❖ the capacity of the protégé to develop the requisite *competence* to assume the senior's place (and vice versa), and
- ❖ the *character* of both the protégé and the senior.

The combination of competence and character determines the extent to which they can trust each other. Without trust, succession cannot succeed. Let's explore each in turn.

### Competence

Being competent means knowing *what* to do and *how* to do it in the context of your organisation, whether family or firm or corporation, and the world in which you work.

Linda Hill and Kent Lineback of Harvard explain that competence has three elements: *technical*, *operational* and *political* knowledge, each of which is important and none more than the others.

Technical knowledge is of the products/services ('*what*') and how to manage the people and processes

involved. Managing requires sound decision-making, priority setting, delegation and having controls in place – to name just some management tasks.

Operational knowledge is the practical know-how to get stuff done (*'how'*), i.e. how goods or services are produced, how team members work together, and what and when resources are required.

Political knowledge combines insight and nous into how things happen in your organisation. In who power and influence reside – and don't in spite of apparent positional authority.

Hill and Lineback explain that you earn others' trust in your competence through what you achieve over time. Without a track record of results, your competence will remain in question.

### Character

Intentions are the core of what we call character. Intentions are the values, beliefs, goals and priorities that drive what people do and the choices they make.

Again, Hill and Lineback offer this insight into the role character plays in how you influence and lead people. To be an effective leader you need to reveal your intentions. People will only follow you if they deeply believe you will do the right thing because you genuinely want to. This requires conscious effort – much more so than most realise. Never assume others will see your positive motives or that in the absence of a concerted effort by you that they will give you the benefit of the doubt.

There are simple, but powerful, ways of convincing others of your sincerity by revealing your intentions:

- Talk explicitly about them to show what's important to you and how your values guide your actions and decisions.
- Display integrity by walking the talk, keeping your word and expecting people to do as you do, not as you say.
- By being consistent in what you say each day, the context in which you say it and to whom you say it.

### Trust is the crucible



Trust is the crucible in which successful succession takes place. The alchemy that trust enables is a sine qua non for succession. Transparency, consistency, competence and character breed trust.

Trust is everything. Trust is fragile. Years of careful effort to build. Minutes of careless action to destroy. No going back.

Succession transitions are possible when trust prevails.

### Read more about succession transitions

#### Others' work

- ✓ [To Build Trust, Competence is Key](#) by Linda Hill & Kent Lineback (exploring the competence component of trust)
- ✓ [For People to Trust You, Reveal Your Intentions](#) by Linda Hill & Kent Lineback (exploring the character component of trust)

#### My posts

- ✓ [Making the Master-Apprentice model work for you](#)