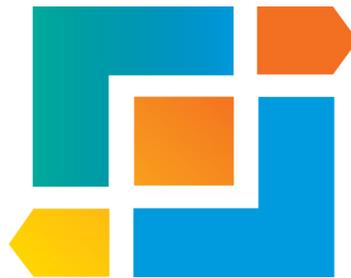


"A system is never so vulnerable, yet never so ready to hope, as during an executive transition"



Executive Transitions: Test-Drive the Transition Dynamics Framework

CBODN: April 24 2015 (1:30-2:45 PM)

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www.Farquharchange.com

SESSION GOALS:

(75 minute session)

1. Explore the Transitions Dynamics/Leverage Points dynamics and model
2. Test-Drive the model: The Story - Dissect, Explore, Map
3. Discussion of how participants might use/amend the model.

OUTLINE:

- Review, discuss key dynamics of executive departures/successions
- Demonstrate how the Dynamics/Leverage Points framework applies
- Test-drive the model in table teams, using a real situation
- Open discussion about when to use, & how to strengthen the model



UVA PRESIDENT TERESA A. SULLIVAN:

9/11/2012 Eric Ogden for *The New York Times*

On Sunday, June 10 2012, members of the University of Virginia community were shocked by a memo that appeared with no advance notice in their email boxes. From Helen Dragas and Mark Kington (Rector and Vice Rector of the Board of Visitors), the memo began:

On behalf of the Board of Visitors, we are writing to tell you that the Board and President Teresa Sullivan today mutually agreed that she will step down as president of the University of Virginia effective August 15, 2012.

The Board's rationale: For the past year, the Board has had ongoing discussions about the importance of developing, articulating and acting on a clear and concrete strategic vision. The Board believes that in the rapidly changing and highly pressurized external environment in both health care and in academia, the University needs to remain at the forefront of change.



TRANSITION DYNAMICS

- Based on the announcement you read, what story do you take away about this transition? Simply state the narrative you develop.
- What are your emotional reactions to this transition story? Why do these matter?
- What are samples of questions you would like to ask, and of whom?
- On what key factors do you imagine the success of this transition may rest? How optimistic are you at this point?
- In what specific ways do you imagine that OD can play a role as the story of the transition evolves?



INTELIQUENT ANNOUNCES DEPARTURE OF CEO G. EDWARD EVANS: NATIONWIDE SEARCH FOR SUCCESSOR INITIATED

(Jan. 16, 2015: Globe Newswire)

Inteliquent, Inc. a leading provider of voice services, announced today that G. Edward Evans will be departing as the Company's Chief Executive Officer in order to pursue other interests. Mr. Evans' employment agreement is set to expire on March 31, 2015. However, the Company and Mr. Evans anticipate that Mr. Evans will continue to act as the Company's Chief Executive Officer beyond such date if necessary to permit the Company to complete a nationwide search for his successor. In addition, it is anticipated that Mr. Evans will resign as a member of the Company's Board of Directors upon his departure as Chief Executive Officer.



AMERICARES CEO ANNOUNCES DEPARTURE

Stamford CT

April 16, 2013 (www.AmeriCares.org)

AmeriCares President and CEO Curt Welling announced today that after eleven years as CEO he has decided to step down. Mr. Welling will continue to lead the organization until his successor is named. The Board of Directors will select an executive recruiting firm in the next few weeks to lead an international search.

“AmeriCares has never been stronger and is poised to take a significant step forward in the years to come,” Mr. Welling said. “Over the past eleven years we have focused on our mission to help many more people live longer, healthier lives and I am proud to say that we have accomplished this in an effective, efficient manner. We also have a new strategic plan in place that will enable AmeriCares to become an even more impactful force in global health...”



NBA NAMES DICK PARSONS INTERIM CEO OF LOS ANGELES CLIPPERS

(NBA.com)

The National Basketball Association has named former Citigroup chairman and former Time Warner chairman and CEO Dick Parsons the interim CEO of the Los Angeles Clippers, effective immediately, it was announced today by Commissioner Adam Silver. Parsons is currently a senior advisor at Providence Equity Partners and sits on the board of directors for the Commission on Presidential Debates. “I believe the hiring of Dick Parsons will bring extraordinary leadership and immediate stability to the Clippers organization,” said Silver. “Dick’s credentials as a proven chief executive speak for themselves and I am extremely grateful he accepted this responsibility.”

“Like most Americans, I have been deeply troubled by the pain the Clippers’ team, fans and partners have endured,” said Parsons. “A lifelong fan of the NBA, I am firmly committed to the values and principles it is defending, and I completely support Adam’s leadership in navigating the challenges facing the team and the league. The Clippers are a resilient organization with a brilliant coach and equally talented and dedicated athletes and staff who have demonstrated great strength of character during a time of adversity. I am honored to be asked to work with them, build on their values and accomplishments, and help them open a new, inspiring era for their team.”



TRANSITION DYNAMICS, ENCORE

- In your Table Team, based on the announcement you read, what story do you take away about this transition? Simply state the narrative you develop.
- What are your emotional reactions to this transition story? Why do these matter?
- What are samples of questions you would like to ask, and of whom?
- On what key factors do you imagine the success of this transition may rest? How optimistic are you at this point?
- In what specific ways do you think that OD can play a role as the story of the transition evolves?



DISSECT: TIME FRAME FOR TRANSITION DYNAMICS

I. Pre-Departure and Announcement of Departure

- **Mode of Exit:** Succession Plan/Routine or Anticipation-Speculation or Surprise/Sudden?
- **“Reason”:** death/disability, greener pastures/promotion, term/contract ends, firing/forced out (conflict, performance, scandal, misalignment, political forces)/Nonrenewed, Released, “Mutual Agreement”, “more time with family”, “pursue other interests, Voluntary retirement, merger/acquisition/reorganization
- **NEXT?** Interim/Acting/custodian or Appointed/Elected Successor

II. Selection Process & Announcement of Successor

- Degree of transparency, Public Awareness
- Conduct, demeanor, public presence of Board/Hiring Entity
- Process advertised by the Hiring Entity, process used
- Expectations held by organization members (past history, culture, etc.)

III. Arrival/entry/onboarding

- Early Actions and Impressions by Newcomer and his/her Top Team & Assocs
- Impressions, speculation and experiences of organization members
- Management of Expectations by involved parties
- Support from Board/Governance/Hiring Entity

IV. “no longer new”/accepted as leader

- A traditional measure of the completion of the transition is the extent to which organization members feel that the newcomer is “no longer new.”



EXPLORE: HOW CAN OD SUPPORT A SUSTAINABLE TRANSITION?

In what key ways is each organization most vulnerable right now?

What are the significant leverage points for the OD Practitioner to help sustain this organization through the transition?



MAP: LEVERAGE POINTS

HOW CAN OD SUPPORT A SUSTAINABLE TRANSITION?

1. Who is your client & what ethical issues/c.o.i. are latent or obvious here?
2. What is **the case for OD** to address key elements: the logistics/ choreography, communications, organization identity, executive success, and the heart & soul of the system, to name a few?
3. Given the scenarios at each phase of the transition dynamics, what OD elements might you bring to bear?
 - Sampling of Intervention points in each of the phases
 - Key Relationships, starting with the executive & hiring authority
 - Skills & Techniques
 - Individual coaching
 - Team dynamics – as a team member and as a consultant/facilitator
 - Research skills
 - Large-group/system knowledge
 -



IN YOUR TABLE TEAM,
CHOOSE ONE EXECUTIVE TRANSITION SCENARIO

List 5 key elements of the “case” for Organization Development relevant to *this scenario*, based on the Transition Timeline and the Leverage Points.

Summarize the essence of your case into 1 sentence or a brief paragraph that could persuade the organization to sign a check for this OD work.





Teresa Sullivan, re-instated as President 10 days after her firing in August 2012, and widely acclaimed for her continuing leadership of UVA. She is no longer “new.”

GET THE STORY: DISSECT, EXPLORE, MAP