

# Sample List of Potential Successors and Plan A

The two exhibits below express the vision of a hypothetical CEO for her senior leadership team in three years. Five people currently report to her, and she expects to add a chief financial officer (CFO) to the team within a year. She also anticipates that her chief development officer (CDO) will retire soon. Through the performance potential conversations she has conducted, she has learned that her CDO believes that the manager in charge of individual giving is willing and able to take on greater responsibility. But the CDO also believes this candidate needs to develop her skills with corporate and foundation donors, and implement a development metrics dashboard. The internal candidates for CFO, on the other hand, need several years of seasoning before they'll be ready to step up. Therefore, the organization will have to recruit a CFO from outside. There's one other key position up for grabs: This CEO does not have a COO. But one of her program directors has the potential to take on greater organization-wide operational responsibilities. If he does so successfully, he may be promoted to senior program director. (Note that this plan addresses an organization's senior-level leadership pipeline. But it's also adaptable to other levels of the organization and may be useful to department heads as well as CEOs.)

## Sample potential successors list

Key Role & Current Leader	Potential Successor(s)	Year Ready (est.)
Jane Michaels, <b>Executive Director</b>	1) George Mendoza <b>Program Director</b>	2016
	2) Sarah Miller <b>Program Director</b>	TBD
Sarah Miller, <b>Program Director</b>	1) Jack Underwood <b>Program Manager</b>	2013
George Mendoza <b>Program Director</b>	1) Bianca Cruz <b>Sr. Program Manager</b>	2013
	2) Chris Herold <b>Program Manager</b>	2015
TBH 2014 <b>Sr. Program Director</b>	1) George Mendoza	2014
Tom Smith <b>Chief Development Officer</b>	1) Cynthia Reed <b>Manager of Individual Giving</b>	2013
	2) Sue Evans <b>Manager of Corporate Philanthropy</b>	2014
Ellen David <b>HR Director</b>	1) Melody Jackson <b>HR Manager</b>	2015
TBH 2012 <b>Chief Financial Officer</b>	1) Frank Vasquez <b>Sr. Finance Analyst</b>	2015
	2) Bethany Harrison <b>Finance Analyst</b>	TBD

## Sample Plan A

Key Role	2012	2013	2014	Comment
<b>Executive Director</b>	Jane Michaels	Jane Michaels	Jane Michaels	No change.
<b>Sr. Program Director</b>	n/a	n/a	George Mendoza	George should take on additional operational roles across 2012-13; if he delivers, he will move into this Sr. Program Director role in 2014, continuing to oversee the program area as well as add further organizational responsibilities to his portfolio.
<b>Program Director</b>	George Mendoza	George Mendoza	n/a	If George is promoted, this role will be replaced by the new Sr. Program Director role in 2014.
<b>Program Director</b>	Sarah Miller	Sarah Miller	Sarah Miller	No change.
<b>Chief Development Officer</b>	Tom Smith	Cynthia Reed	Cynthia Reed	Cynthia should use 2012 to build her skills with corporate and foundation donors, and implement a development metrics dashboard; if she delivers, she will be ready to move into the CDO role.
<b>HR Director</b>	Ellen David	Ellen David	Ellen David	No change.
<b>Chief Financial Officer</b>	TBH in 2012	TBH in 2012	TBH in 2012	TBD – This will likely be an external hire, due to the junior finance bench.

Source: Adapted from American Express Corp. template