

Succeeding A Legend

It's hard enough to be a new CEO, but it's significantly harder when the former CEO was both long-tenured and beloved. How can you succeed when you're constantly measured against such a demanding standard? | **By Francie Dalton**

“Following a long-time CEO will require a certain generosity of spirit,” says Kerry C. Stackpole, CAE, interim executive director for the National Association of Hispanic Publications. “The already difficult role of CEO is exacerbated when emotions are involved. Intellectually, the parties may articulate a willingness to move on, but hearts can remain entangled in the past.” When the departing leader is beloved and the long-time legacy is positive, succession poses even greater risks.

So stop for a moment and take a deep breath. The statistics aren't favorable for those who follow great predecessors. Clarify your thinking about what you're taking on. Although substantive and useful works have been published about leadership transitions—*The First 90 Days* by Michael Watkins and *Making a Leadership Change* by Thomas North Gilmore primary among them—none deals specifically with the unique set of challenges attendant to succeeding a legend.

Presented here is a synthesis of interviews with eight CEOs who followed legacy leaders. They provide priceless advice for the three parties whose behaviors and processes will determine the success of such transitions: candidates assessing such an opportunity, board members responsible for stewarding a successful transition from a legacy CEO, and legacy leaders passing the baton.

Advice for the Successor Candidate

As a potential successor to a long-time CEO, yours is the heaviest burden during the assessment stage. Executing due diligence is tough enough under the best of circumstances. When succeeding a legendary CEO, you'll need to intensify your information gathering and increase your vigilance regarding eight faulty beliefs to which you're particularly vulnerable.

Believing you can rely, without further scrutiny, on the information provided by selected individuals or groups as representing the whole picture. Take the initiative to confirm and

“Expect staff to behave in ways that reveal their insecurity, their grief, and their feelings of abandonment relative to your predecessor.” —ROBERT T. VAN HOOK, CAE

expand what has been shared, and get as much information as possible from as many sources as possible. In ferreting out this information, be alert to what isn't said, to responses that seem to skirt your questions, and to the types of information you had to struggle to elicit. Deductive and inductive reasoning will be required on a near moment-by-moment basis to reveal the implications of what you aren't hearing.

Believing that discussion about the legacy leader's success would be inappropriate. Key stakeholders may not want to be specific with you about the factors that contributed to your predecessor's long tenure. Tease out what made her tenure endure, the strengths and weaknesses of the legacy leader, and with whom she had the deepest ties and what the critics complained about. “Pay special attention to what was appreciated about your predecessor,” advises Ronnie Wilkins, Ed.D., CAE, executive director of the American College of

Neuropsychopharmacology. “Instead of craving the spotlight yourself, publicly acknowledge your predecessor's strengths early and frequently.”

Believing you'll be told about the traditions and rituals built by the legacy leader. “You won't be told about these until you don't do them,” says Stackpole. “Not necessarily because anyone is trying to withhold the information, but because these customs won't be missed until they aren't done.”

Believing that being indisputably correct will prevail over the emotionalism of others. Despite the unassailability of your ideas for improvements

in policies, procedures, structure, and so forth, imposing these changes will be interpreted as a criticism of—even a dishonoring of—your predecessor. Instead, create opportunities for staff to conceive and implement needed changes.

Believing you should prioritize the early demonstration of your own value over the need to stabilize relationships. Says Robert T. Van Hook, CAE, president of Transition Management Consulting, Inc., “Expect staff to behave in ways that reveal their insecurity, their grief, and their feelings of abandonment relative to your predecessor.” Rather than rushing to make your mark on the organization, repeatedly and specifically acknowledge all that is right, all that has been done well, and the challenges that have been overcome. “Instead of trying to displace the legend, smart leaders realize the need to focus on pulling key stakeholders together,” says Richard Coon, executive director of the RV Industry Association.

Believing that your functional expertise will be valued over your predecessor's relationships. Although you may well be led to believe that your capabilities are of primary importance, those who follow legends can be surprised when this proves not to be the case. “You'd better click through who is on the board—what their interests, beliefs, and values are—and consider carefully whether you can actually perform to these,” says Coon.

Believing that key stakeholder endorsement of your dramatically different style is sufficient to ensure successful integration of your style. Just because the search committee or the executive team has said your style is exactly what's needed, don't think you won't encounter pockets of severe resistance. Considerable behavioral editing may be necessary initially, as people adjust to the transition in styles. Lynn Nicholas, FACHE, president and CEO of the Massachusetts Hospital Association, warns, “Recognize the enormous importance of how much people will miss the familiar culture and the personal relationship built over a long period of time with a legacy leader.”

Believing you're obligated to agree to a protracted period of continued, conspicuous involvement by your predecessor. It's crucial to elicit exactly what the board expects from your predecessor and how they'll assess performance. Equally important is to help them articulate specifically how the role of your predecessor will integrate with your own. Probe to uncover the underlying reasons for wanting to continue to engage your predecessor; this will equip you to identify alternatives for achieving their real objectives in ways that don't hobble the transition.

Advice for Board Members

For board members, one piece of advice comes before all others: Stop enshrining the legendary leader. No matter how benign and honorable your intentions, your responsibility to the new leader is incalculably more important than continued demonstrations of affection and

recognition toward the former leader.

Keeping the legacy CEO on board in any post-transition capacity puts the new leader in an impossible position. And please note: Getting the new leader to agree to it does not nullify your responsibility to end the legacy CEO's role. True, it's sometimes appropriate to craft a dual-leader transition period where the new leader shadows the predecessor. This can effectively inaugurate relationships and ease the transfer of responsibility. However, this period should be as brief as possible, and the end point must be clearly defined and adhered to absolutely. And once the transition plan is complete, no contracts, no board seats, and no peripheral engagements.

While the work of associations often creates strong and enduring friendships, the maintenance of your personal relationship with the former CEO should occur outside of the organization. Find other venues in which to interact, other organizations through which honors can be bestowed, and other opportunities to continue the relationship—but stop maintaining a connection with the legacy leader in ways that are visible to staff.

Even occasionally engaging the legendary leader in positions of authority or influence will seriously and inevitably undercut the new CEO. Including the past CEO in functions, whether onsite or offsite, perpetuates the past in a way that at best holds up and at worst impedes the stabilization of new leadership. Equally important, maintaining linkage with the legendary leader implies consent for, and indeed encourages, end runs by disgruntled staff, the continued use of the past leader as a key input to decision making, and covert information sharing.

Because ambiguity in leadership is disconcerting to all concerned, boards tend to accelerate filling a vacant CEO position. The focus on finding the right person for the job can be so intense that post-installation stabilization never becomes part of the plan. Here's why that presents a significant vulnerability.

There is a natural, understandable

tendency for staff to prefer the counsel, advice, and consulting of their legacy leader. Inadvertently, just by participating in conversations about how much the legacy leader is missed, board members can perpetuate these tendencies, protracting the period of ambiguity and ultimately destabilizing the new leader.

Board members must understand that merely deflecting such conversations is not sufficient. Instead, there must be overt, explicit, iterative favor shown toward the new leader by the board. It is the responsibility of each individual board member and the board as an entity to actively redirect the staff's emotional commitment toward the new CEO. "Even if there isn't complete agreement with the initiatives of the new CEO, board member cooperation is vital," says Coon.

Board chairs and the executive committee have an even higher level of responsibility. Vigilance and effort will be required to quell the complaints of predecessor devotees, to rein in errant board members, and to manage the vocal minority. But it is essential that the board forms a united front and stands fully and consistently behind the new CEO. Board leaders must exert sufficient

leadership to ensure such unity—or the consequence will be a failed transition. "Take the time to get it right up front," says Karen Tucker Thomas, CAE, president of KST Consulting. "Put the necessary attention and resources toward success—because the alternative is so painful."

Advice for Legacy Leaders

As a legacy leader, do you really want to put your board in the position of having to follow the above advice? Do you want to put the onus on them to do the right thing—or do you want to initiate this necessary process yourself?

The one who should step up here is you. Help design the search and selection process if you like, but do not engage in the execution of that process. Once your successor is on board, have the class, wisdom, and selflessness to establish and adhere to a transition process that doesn't detract from the new CEO. Here's a great template to follow once the transition period is over:

- Agree to serve as a resource for a specified period of time, but only through the new CEO and never onsite. The duration of your accessibility doesn't matter, as long as you

WORDS OF WISDOM

"Don't get into a tug of war with a ghost. It's not about whether you'll be equally beloved; it's about whether you can lead."—Robert T. Van Hook, CAE, president, Transition Management Consulting, Inc.

"Understand clearly why your predecessor was successful. Then decide if complementary talents are within your skill set."—Lynn Nicholas, FACHE, president and CEO, Massachusetts Hospital Association

"Tenacity will override an awful lot."—Kerry C. Stackpole, CAE, interim executive director for the National Association of Hispanic Publications

"If something doesn't feel right to you, trust your gut and keep probing."—Karen Tucker Thomas, CAE, president, KST Consulting

"Remember: You didn't just parachute out of the sky. The board chose you for a reason. Be confident about your ability to lead."—David Patt, CAE, executive director, Association of Running Event Directors and president of Association Executive Management

"Be true to yourself. Be your own person. Following the legend doesn't mean being like the legend."—Richard Coon, executive director, RV Industry Association

"Love the mission; love the organization; love the job. This will go a long way toward taking the edge off of anything negative."—Ronnie Wilkins, Ed.D., CAE, executive director, American College of Neuropsychopharmacology

"Let the irritant produce the pearl."—Cheryl Kreider Carey, CAE, executive director, American Academy of Audiology

are no longer visible to staff.

- State explicitly that you will not make further appearances on behalf of the organization, and adhere to this commitment no matter what.
- Be completely transparent with the new CEO—and completely invisible to the organization.

Advice for Those in Purgatory

Have you succeeded a legacy leader recently, only to discover that

- Secret phone calls and meetings are occurring between your predecessor and your staff?
- Your decisions are being blocked by an influence-wielding predecessor?
- You're perpetually in the shadow of your predecessor at significant events?
- You're unable to establish relationships with your direct reports, whose continued loyalty is being actively courted by your predecessor?
- Staff are complaining to the board about you and threatening to leave?
- Multiple stakeholders are implying you should be more like your predecessor?
- Well-placed sources are telling you your continued tenure is in jeopardy?

These can be gut-wrenching, spirit-crushing, heart-rending experiences—unless you steel yourself against the emotional trauma.

You can get through it with your self-esteem intact if you follow the advice collected from those who have been through it, have coached others through it, or have watched others successfully move through it.

First and foremost, act to prevent the situation from worsening. Don't assume everything will just work itself out. You must confront the causal factors and take action to neutralize them.

If you're dealing with an intrusive predecessor, have a frank conversation that produces an agreement to halt divisive behavior. If the agreement is subsequently violated, consider a follow-up conversation that includes your board chair and produces a more formal agreement.

When board members are being conspicuously unsupportive, consider one-on-one conversations. Be transparent about what's not working and be explicit about behaviors that must be in evidence moving forward. "Don't make the board or your predecessor the subject. Get this off the table," says David Patt, CAE, executive director of the Association of Running Event Directors and president of Association Executive Management. "Instead, put the business issues on the table and get attention focused on these."

Also important, emphasizes the American College of Neuropsychopharmacology's Wilkins, is the need to "collect and use good, hard data to support your decisions. This makes it easier to get buy-in from your board."

With senior staff, one-on-one conversations can be remedial. Be explicit about the behaviors that you've noticed, and as above, be explicit about the behaviors that must be in evidence moving forward. You might also consider a facilitated team-building retreat, perhaps augmented by the use of behavioral assessments.

If you realize that your worst enemy is you, don't wait to get help. Indeed, if you wait until you actually need the help, it may be too late. Consider retaining an executive coach. "Reach out to family and friends or to a more experienced association CEO in a different industry," advises Thomas of KST Consulting. "Their support is crucial at this stage." If you've been on board at least six months, consider the use of a 360 degree feedback process or an employee survey. "It's not about whether we think we're good leaders," says Cheryl Kreider Carey, CAE, executive director of the American Academy of Audiology. "This can only be measured by those we lead."

Perhaps even more important is that you take deliberate steps to strengthen your emotional endurance. Helpful here will be doing your job and doing it well. Be crystal clear about board priorities and demonstrate measurable progress on each.

Next, stay involved in constructive initiatives; identify what you see as the most meaningful work of the organization and engage in these efforts. Consistently strive to incorporate work projects on which you can succeed.

Finally, "Don't focus on your predecessor. That's history, and it is what it is," says Wilkins. "Focus on the future, not on the past." **an**

Francie Dalton is founder and president of Dalton Alliances, Inc., a business consultancy specializing in the behavioral, management, and communications sciences. Dalton is the author of Versatility: How to Optimize Interactions When 7 Workplace Behaviors Are at Their Worst, which will be published by ASAE & The Center later this month and available at www.asaecenter.org/bookstore.

Review and comment on this article at www.asaecenter.org/associationsnow.