Succession Scenarios

Determining Successor Readiness by Scenarios

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Use these scenarios to add context to successor readiness by asking not only "ready for the role?" but also "ready for what scenario?"

1. Major Strategy Shift

What it is:
The organization is meaningfully changing direction, such as entering new markets, changing its business model, or repositioning competitively.

What it may call for:
Strategic agility, the ability to reset priorities, and experience translating a new direction into coordinated action.

2. Mergers & Acquisitions

What it is:
The organization is acquiring, merging with, or being acquired by another organization, requiring integration across cultures, systems, teams, and ways of working.

What it may call for:
Integration experience, stakeholder management, cultural sensitivity, and the ability to navigate competing interests and ambiguity.

3. Founder-Led to Investor-Led / Private to Public

What it is:
The organization is moving toward more formal governance, transparency, accountability, and oversight from boards, investors, or public markets.

What it may call for:
Governance discipline, comfort with scrutiny, stronger stakeholder communication, and experience operating in more formal environments.

4. Turnaround

What it is:
The business is facing significant performance or financial challenges and requires rapid stabilization and corrective action.

What it may call for:
Decisiveness under pressure, resilience, strong prioritization, and experience stabilizing underperforming teams or businesses.

5. Culture Change

What it is:
The organization is intentionally reshaping norms, values, behaviors, or ways of working, often as part of a broader change effort.

What it may call for:
Credibility, role modeling, listening, trust-building, ability to influence behavior and reinforce new norms.

6. Rapid Growth

What it is:
The business is scaling quickly, entering new markets, expanding products or capabilities, or growing faster than existing structures can support.

What it may call for:
Comfort with ambiguity, experience scaling teams and processes, strong prioritization, and a bias toward action.

7. Major Transformation

What it is:
The organization is fundamentally changing how it operates, such as through technology, operating model, structure, integration, divestiture, or broader transformation.

What it may call for:
Change leadership, coalition-building, systems thinking, and the ability to redesign how work gets done while sustaining execution.

8. Stability / Sustained Performance

What it is:
The business is performing well and the priority is maintaining momentum, consistency, and execution discipline rather than introducing unnecessary disruption.

What it may call for:
Operational discipline, sound judgment, continuity, and the ability to improve what is working without overcorrecting.

These scenarios are not mutually exclusive. Use judgment to determine which scenario, or combination of scenarios, is most relevant.