

Member Communication Experience

How to Prepare a Successor for Success

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A few years ago, I was consulting with an engineering firm that had chosen an internal candidate to be their next CEO. Unfortunately, even though he had worked for the company for over 20 years and had even become a part owner – he had no idea what a CEO did. He was quite worried about ascending to the helm of the organization and failing.

This scenario is actually more common than not. Companies tend to promote people who are excellent at their job – but not prepared for the next one.

The most successful leadership transitions don't happen by accident – they're carefully planned, nurtured, and guided. Whether you're running a family-owned business, leading a division in a larger company, or planning to retire from your role as CEO, identifying and preparing a successor is one of the most impactful legacies you can leave.

Passing the baton to someone who is merely “next in line” isn't enough. Your successor needs to be equipped to thrive in the role. That requires more than a title change or a seat at the leadership table. It requires a structured, strategic, and human-centered approach to development. Here's how to do it right.

1. Create a Formal Development Plan

Leadership doesn't happen in a vacuum, and neither should leadership development. Once you've identified a potential successor – or even a shortlist – it's time to map out a formal development plan. This document should outline the competencies, experiences, and leadership behaviors your successor will need to demonstrate before assuming the role.



This isn't a vague wish list. Think specifics: What decisions should they be able to make independently? What financial acumen do they need to gain? What cross-departmental relationships must they build?

A formal plan not only clarifies expectations but also keeps both you and your successor accountable. Regular check-ins on progress, documented milestones, and a clear timeline for readiness are all parts of what makes this process successful.

2. Offer Mentoring from the Incumbent

No one knows your role better than you do. As the current leader, you carry not just a job description, but years of insight, instinct, and institutional knowledge. Passing that on isn't about creating a clone – it's about mentoring someone through the nuanced realities of the role.

Mentoring gives your successor access to your thinking process. It helps them understand how you make tough calls, manage relationships, and respond to crises. It also builds trust, gives them a safe space to ask questions, and – perhaps most importantly – allows you to model the values and behaviors you want to see continued after you step away. Mentoring can be formal, such as a standing weekly meeting to review what has happened in the department or business, or informal such as saying, “Be sure to stop me anytime you have a question; my job is to ensure you are both skilled and confident in your new role.”

3. Assign Projects That Expand Their Skill Set

One of the best ways to prepare a successor is to give them real-world opportunities to stretch and grow. Assign projects that expose them to areas adjacent to their current expertise. For example, if someone is being groomed for a marketing leadership role, give them projects that connect them with business development or customer success, so they gain a broader view of how their function supports the company's overall growth.

This not only expands their operational knowledge but also hones their strategic thinking. They'll learn to align their decisions with larger business objectives and they'll develop a much stronger internal network along the way.

4. Invest in Coaching and Educational Opportunities

Even the most promising future leaders can benefit from an outside perspective. Executive coaching can help successors better understand their leadership style, navigate interpersonal dynamics, and work through the internal shifts required to lead at a higher level.

Likewise, targeted education – whether it's a leadership course, a financial literacy boot camp, or industry certification – can fill gaps in knowledge that may not be covered through on-the-job experience. Investing in these resources sends a powerful message: “We believe in your potential, and we're committed to your success.”

5. Let Them Sit in the Seat

Perhaps the most telling part of any succession plan is how well your successor can perform in your absence. Vacations, medical leave, or sabbaticals offer a valuable opportunity

for your successor to step into your role and experience the pressure, pace, and personnel management firsthand – knowing they have a lifeline if they need it. You'll both quickly learn what's working and what needs more development before the transition becomes official.

Preparing a future-leader isn't a task to be rushed or delegated. It's an investment that protects your company, your team, and the legacy you've worked hard to build. With a formal development plan, mentoring, skill-expanding projects, professional growth opportunities, and real-world trial runs, you'll not only prepare a successor – you'll prepare a leader who's ready to thrive. 🦋



About the Author

Dr. Nanette Miner is an expert in building ready and capable leadership teams for succession and exit.

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