



## READ THIS BEFORE EDITING YOUR LEADWELL™ MATERIALS

Welcome to LeadWell™. This CEO Succession Planning Toolkit contains informational BoardBriefs and templates for essential documents, which include step-by-step instructions and examples to assist you in preparing for a change in CEO leadership.

### What's Included in LeadWell™

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In addition to this “Read This Before Editing Your LeadWell™ Materials” document, LeadWell™ includes the following:

- Introduction and Overview – This document provides an overview of the succession planning process.
- BoardBRIEF – Continuity at the Top: Ensuring Stability in Leadership Succession – This BoardBrief provides an overview of the importance of succession planning, and the key components of a meaningful succession plan.
- BoardBRIEF – New CEO On Board – This BoardBrief provides an overview of an “onboarding” program in the board’s succession planning that allows the new CEO to quickly adapt to the organization and set the stage for leadership success. It includes the elements of a comprehensive onboarding plan.
- Board and Management Responsibilities – This document clearly maps the various roles of the board and management in key responsibility areas.
- CEO Candidate Profile – The CEO candidate profile provides a customizable template listing essential CEO responsibilities; desired skills, expertise and attributes; and qualifications.
- CEO Job Description – The CEO job description provides a customizable template description of CEO responsibilities, desired qualifications, and information about when and where to submit applications and resumes.
- CEO Candidate Interview and Assessment – The candidate interview and assessment form provides a customizable template that includes a list of over 60 potential criteria for the board to assess and evaluate the potential candidate.
- CEO Onboarding Strategies and Templates – This document outlines the components of a comprehensive onboarding program, and includes six templates for planning the various steps.

## **For Additional Assistance**

If you have questions or need information, please contact us by calling (630) 613-7580 or by sending an e-mail to [barb@governwell.net](mailto:barb@governwell.net).

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