



PRESIDENTS TRAINING LIFECYCLE (PTL)

SUCCESSION PLANNING GUIDE

As a successful business owner, you understand the importance of **building a high-performing team**. The strength of your chapter board will directly affect your success as president, which will ultimately provide your members with **unforgettable experiences, valuable learning and meaningful connections**.

This guide will equip you with the tools necessary to build a cohesive, committed and capable chapter board. To successfully build your board, review and complete the following three parts.



CRITERIA AND RECOMMENDATIONS FOR CHOOSING YOUR BOARD

This section will focus specifically on what qualities and experience to look for when selecting your dream team. Below you will find guidelines and best practices that will assist you in drafting your chapter board for your term as chapter president.

Some important things to note before you dive in:

- The backbone of EO is experience sharing, and as such, this document is a reference point to guide your decisions. It is not a rigid instruction that must be adhered to in full.
- These suggestions have been crafted with the help of tenured member leaders and EO professional staff from every department to ensure that you are set up for success.
- Please note the *Chapter Size Considerations* column, especially if you will lead a small (<50 members) or large chapter (>150 members). Chapter size affects the duties of these roles, as well as the potential inclusion of co-chairs and/or chair role committees.
- *Professional Expertise*, as listed in the second column of this table, can make a significant difference in the effectiveness of your board, but is again a suggestion rather than a rule. There are many examples of strong board members working outside their professional scope in their role on a chapter board.

CRITERIA AND RECOMMENDATIONS FOR CHOOSING YOUR BOARD

BOARD ROLE	IDEAL STRENGTHS/ TRAITS	AREA OF PROFESSIONAL EXPERTISE	PREVIOUS BOARD ROLES	NOTES/CHAPTER SIZE CONSIDERATIONS
MEMBERSHIP CHAIR	<p>High energy, accountable, and has ample time to allocate or is able to delegate to a committee</p> <p>Charismatic networker, attentive, extroverted and highly communicative</p>	<p>Sales background, strong ability to close, growth mindset</p> <p>Bonus: Experience interviewing and screening candidates</p>	<p>At least one year of board experience, ideally in a member-facing role</p>	<p>Large chapter: have served in a membership co-chair or committee role prior</p> <p>Small chapter: has a growth mindset, strong ability to close prospects by sharing their EO story</p>
LEARNING CHAIR	<p>Forward-thinking planner, highly organized, creative thinker, intuitive, works well with others (especially chapter staff), is well connected, a natural passion for learning, inclusive and highly engaged</p> <p>Bonus: has an emcee style</p>	<p>Strong attendance and participation in chapter, regional and global events</p> <p>Knowledge of event planning</p> <p>Ability to engage frequently with chapter staff and others</p> <p>Wealth of connections is a plus</p>	<p>MyEO Chair, Social Chair</p> <p>Prior co-chair or committee member for Learning</p>	<p>Strong belief in EO's mission/ambition/purpose</p> <p>Large chapter: consider building a co-chair or committee system for learning</p> <p>Small chapter: work closely with Member Engagement to focus on recruitment</p>
MEMBER ENGAGEMENT CHAIR	<p>Engaged, empathetic, compassionate</p> <p>Able to sense who may need more guidance to engage</p> <p>Strong understanding of place in Trifecta and EO benefits</p>	<p>Customer service (member success) background, marketing knowledge</p>	<p>Moderator experience, can be first-year board member</p>	<p>Engage all levels of tenure chapter-wide</p> <p>Large chapter: emphasis on connecting new and tenured members, having a co-chair, navigators or a committee to match new members with the right EO benefits</p> <p>Small chapter: understand the needs of every member to drive chapter strategy</p>
FORUM CHAIR	<p>Empathetic, discreet, tactful, high EQ</p> <p>Communicative with moderators, strong people skills, creative, quick on decisions</p> <p>Comprehensive product/Forum journey knowledge, ability to motivate moderators</p>	<p>People management, service-oriented, conflict management, "human touch" and sensitivity</p>	<p>Past moderator experience (required)</p>	<p>Large chapter: strong organization skills a must, consider a co-chair</p> <p>Small chapter: maintain strong understanding of each Forum's health and sensitivities, communicate regularly to Trifecta and President</p>
FINANCE CHAIR	<p>Precise, transparent, accountable, detail-oriented</p> <p>Self-motivated and autonomous</p> <p>Healthy relationship with chapter staff, Learning Chair and President</p>	<p>Finance background (CPA, ideally)</p>	<p>None needed</p>	<p>Large chapter: experience with accounting systems, future budget forecasting</p> <p>Small chapter: must be direct and strategic on priorities while working within a constrained budget</p>

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MARKETING AND COMMUNICATIONS CHAIR	Strong communication skills, high level of chapter engagement, stays current on all things EO	Marketing/communications background, social media marketing expertise helpful	None needed	<p>Balanced focus on internal and external comms</p> <p>Large chapter: may potentially liaise with third party contractor/ company on social media/newsletters. Collaborate with external positions: ME, EE, GSEA, SA chairs</p> <p>Small chapter: need to creatively engage a small group and collaborate with rest of board and create simple process/ tools for internal comms</p>
EXTERNAL ENGAGEMENT CHAMPION	<p>Relationship builder</p> <p>Passionate about making an impact</p> <p>Willingness to implement new role in the chapter</p>	<p>Connected/involved in other organizations in the community</p> <p>Preferred but not necessary: sustainable business experience, familiar with sustainability initiatives</p>	None needed	<p>Large chapter: time commitment to build relationships in the community</p> <p>Small chapter: role can be combined with existing chair. Ex: GSEA, SA, Marcomm, is not necessary until chapter hits 40 members</p>
STRATEGIC ALLIANCE CHAIR	<p>Broker/deal maker, closer</p> <p>Genuine passion for EO/member perception of value</p> <p>Ability to nurture relationships</p>	<p>Strong local network of potential sponsors and partners</p> <p>Sales experience</p>	None needed	<p>Large chapter: can nurture and sustain partner relationships and provide value for members</p> <p>Small chapter: secure and maintain bank, law firm and accounting partners, strong recruitment skills preferable</p>
MyEO CHAIR	Strong social connections, personal touch, self-starter, energized, mover and a shaker, inclusive	Connected networker, socially engaged, experience working with products and programmes	<p>None needed</p> <p>Bonus: Previous Learning chairs or committee members, experience with EO products and programmes</p>	<p>Ideally will delegate to champions for events/groups</p> <p>Small chapter: should look regionally for multi-chapter opportunities and other MyEO groups/products</p>

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ACCELERATOR CHAIR	<p>Highly organized and energetic</p> <p>Enthusiastic, motivated, self-starter, strong mentor</p> <p>Is a thought leader</p>	<p>Interest in helping small businesses grow</p> <p>Coaching and mentoring experience</p>	<p>Experience leading a board</p> <p>Preferably Accelerator graduate</p> <p>Served on another board position prior</p>	<p>Large chapter: need a strong leader who's accountable to run the programme autonomously</p> <p>Small chapter: find an EOA-qualified champion who builds a board and maintains the programme, many opportunities for mentoring EOA members, but should not take substantial board time</p>
GLOBAL STUDENT ENTREPRENEUR AWARDS CHAIR (GSEA)	<p>Enthusiastic, self-starter, passionate, inclusive, committed to making a positive impact</p>	<p>Project management experience</p> <p>Connection to local universities/student network</p> <p>Marketing experience or connections</p>	<p>None needed</p>	<p>Chair should collaborate with Learning, Mentorship, SAP, Marcomm chairs to leverage chapter resources and engage other members</p> <p>Encourage the chair to build a committee to distribute tasks</p>
MENTORSHIP CHAIR	<p>Passionate, self-starter, tenured member/business owner</p> <p>Ability to be flexible, ability to deal with many personalities</p>	<p>Helps to have a strong network of mentors or mentees</p> <p>Helps to have a good strategic mindset</p>	<p>Accelerator Chair, Forum Chair, Membership Chair, Past Presidents, Mentorship Chair or Expert</p>	<p>Ability to commit time and effort into both learning about their role and keeping everyone engaged</p>
SOCIAL CHAIR	<p>Highly socially engaged, hospitable, inviting and flexible, fun, easygoing, open and outgoing</p>	<p>None needed</p>	<p>Not needed, but past Learning chairs, MyEO chairs, Member Engagement chairs preferred</p>	<p>Must have time to commit to last-minute social engagements</p>

Other considerations:

- Your board should have even representation from your Forums
- Your board benefits from inclusivity: equal representation across gender, ethnicity, age, tenure and expertise
- Including new members on the board can boost energy and offer fresh perspectives while accelerating their integration into the chapter
- Connecting with your moderators is a great way to source members who have the leadership skills needed to excel on your board

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PROSPECTIVE BOARD SELECTION WORKSHEET

Use the worksheet to build an overview of potential candidates for your board. Refer to the table above (*Part One: Criteria and Recommendations for Choosing Your Board*) to help inform your criteria in selecting prospective board members.

You may need to include multiple candidates for some roles, as well as potentially including co-chairs and/or committees.

Once completed, you will be ready to engage with your candidates with a clear understanding of why you think they are the right fit. This should ultimately guide your conversations with each prospective member of your board.

PROSPECTIVE BOARD SELECTION WORKSHEET

BOARD ROLE	NAME (INCLUDE CO-CHAIRS / COMMITTEES)	WHAT MAKES THEM A GOOD FIT?	WHAT EXPERTISE DO THEY BRING TO THE ROLE?	LIST PREVIOUS EO LEADERSHIP EXPERIENCE	OTHER CONSIDERATIONS
MEMBERSHIP CHAIR					
LEARNING CHAIR					
MEMBER ENGAGEMENT CHAIR					
FORUM CHAIR					
FINANCE CHAIR					
MARKETING AND COMMUNICATIONS CHAIR					
EXTERNAL ENGAGEMENT CHAMPION					
STRATEGIC ALLIANCE CHAIR					
MyEO CHAIR					
ACCELERATOR CHAIR					
GLOBAL STUDENT ENTREPRENEUR AWARDS CHAIR (GSEA)					
MENTORSHIP CHAIR					
SOCIAL CHAIR					

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BOARD COMMITMENT TRACKER

This final component of the first stage of your President's Training Lifecycle will help keep you organized and engaged in your interactions with prospective board members. It will also assist you in tracking agreements.

To ensure a successful year, it is recommended that you:

- Engage your prospective board members as early as possible in your elected term
- Have official agreements from the following roles by January 1 (must be before GLC):
 - Forum Chair, Membership Chair, Member Engagement Chair, Learning Chair, as well as President Elect-Elect
- Receive official agreements from your board no later than mid-January (small exceptions are acceptable, i.e. one or two vacant roles you believe may be filled no later than 1 March)

Many chapters utilize Board Role Agreements, or formally drafted documents that look and feel like a contract (though they are not binding in a legal sense). If interested, please reach out to your regional staff lead or Area Director for this type of resource/experience share.

Mark each box with dates (if applicable) and/or comments if needed. You may need to clear this out and start again for certain roles where your first choice does not agree to take on the role.

BOARD COMMITMENT TRACKER

BOARD ROLE	NAME (INCLUDE CO-CHAIRS / COMMITTEES)	INITIAL INQUIRY (WHEN DID YOU ASK?)	FOLLOW UP (THEY NEEDED TIME TO ANSWER, DID YOU RE-ENGAGE?)	VERBAL AGREEMENT (WHEN DID THEY SAY YES, EVEN IF CASUALLY?)	OFFICIAL AGREEMENT (IS IT OFFICIAL?)
MEMBERSHIP CHAIR					
LEARNING CHAIR					
MEMBER ENGAGEMENT CHAIR					
FORUM CHAIR					
FINANCE CHAIR					
MARKETING AND COMMUNICATIONS CHAIR					
EXTERNAL ENGAGEMENT CHAMPION					
STRATEGIC ALLIANCE CHAIR					
MyEO CHAIR					
ACCELERATOR CHAIR					
GLOBAL STUDENT ENTREPRENEUR AWARDS CHAIR (GSEA)					
MENTORSHIP CHAIR					
SOCIAL CHAIR (HALO CHAIR)					

Once you have completed Parts One, Two, and Three, you will have successfully chosen your board. **Congratulations!** This group of strong leaders has agreed to volunteer their time and energy to serve alongside you.

WHAT'S NEXT?

The next component of your President's Lifecycle Training will focus on **envisioning** your year as president. The primary focus will be on **transitioning** your board, **building** your vision, and **connecting** it to the larger, multi-year vision of your chapter.



Entrepreneurs'
Organization