Growth & Ownership Strategies conference™

Succession Without the Scramble

Strengths-Based Succession Planning for Next-Gen Leaders

Future-led. Strengths-informed. Built through real work.

PRESENTED BY:

CHANDRA STORRUSTEN

CEO & CHIEF VALUE CREATION OFFICER

Visible Value®

© 2026 Visible Value. All Rights Reserved.

Succession planning is a value creation opportunity

Aligned with strengths-based leadership development and your firm’s future

Who has seen succession become urgent before your organization felt ready?

If Your Firm Changed Faster Than Expected, Would Leadership Capacity Be an Advantage or a Constraint?

Your strategy can move only as far as your leadership capacity allows.

What strategic ambition could outpace your current leadership capabilities?

From Naming Successors to Building Leadership Capacity

Three mindset shifts that make succession a daily leadership discipline.

- **From replacement to strategy:**
  What leadership capabilities will our firm's future require?
- **From tenure to evidence:**
  Where are people practicing consequential responsibility?
- **From a one-time effort with annual updates to an operating rhythm:**
  How will development continue through everyday work?

Which shift would most improve your firm's approach?

Our Journey Today: Translate Strategic Ambition Into Leadership Capability

Make the connection between the future you want, and the experiences leaders need.



The Future Needs More Than the Next in Line

Start with the future of the firm, not who follow whom.

- What leadership capabilities will our firm’s future require?
- What must remain distinctive about our firm?
- What responsibilities, assumptions, or roles may need to change?

In pairs: What leadership requirement might reflect your firm’s history more than its future?

Four Strengths Domains. More Ways to Contribute.

Use HIGH5 to broaden the development conversation.



HIGH5 Strengths

- **Talent:** Something you are naturally good at
- **Energy:** Something that energizes you rather than drains you
- **Meaning:** Something that feels purposeful and important to you

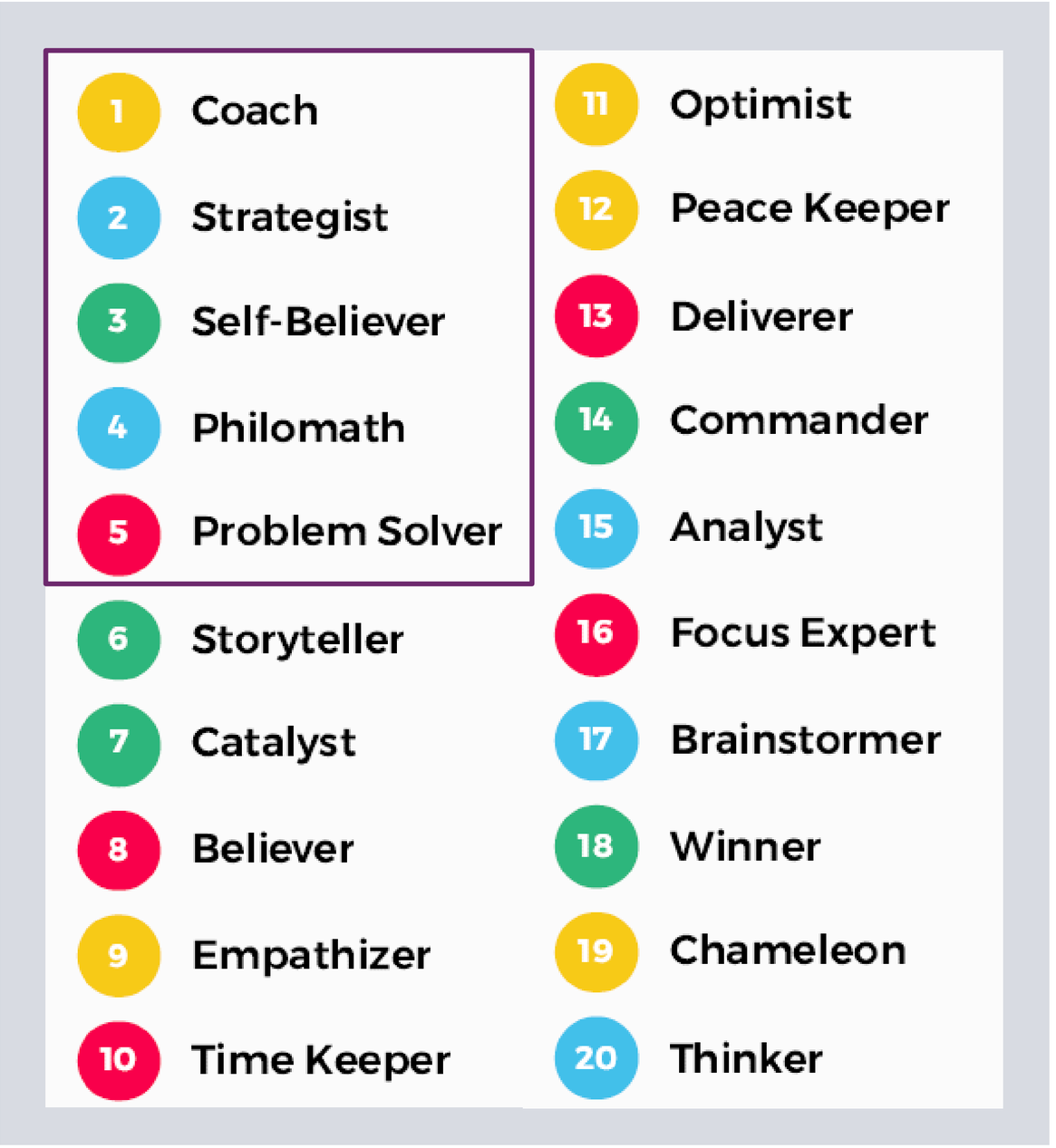
Which strengths does your firm most consistently reward?

Strengths Are a Starting Point for Development

Connect natural contributions to real leadership challenges and opportunities

Showcases your unique strengths and attributes

Self Reflection: What are two of your strengths?



Combinations Changes the Contribution

Explore how your strengths work together in specific leadership situations.



Strategist + Coach
Connect a longer-term direction with another person's development.



Strategist + Problem Solver
Connect the larger objective with a practical response to an immediate obstacle.

How could a combination of your strengths change the way you approach a strategic challenge?

Complementary Partners Expand What Becomes Possible

Design the partnership around the work, not the labels.

A useful development partnership combines:

A clear shared outcome | Different contributions| Explicit responsibilities | Space for both people to influence the work



CATALYST

Push others forward by building momentum

+



COACH

Pull others forward with a nurturing heart

=



PARTNERSHIP

Empowers any team for success

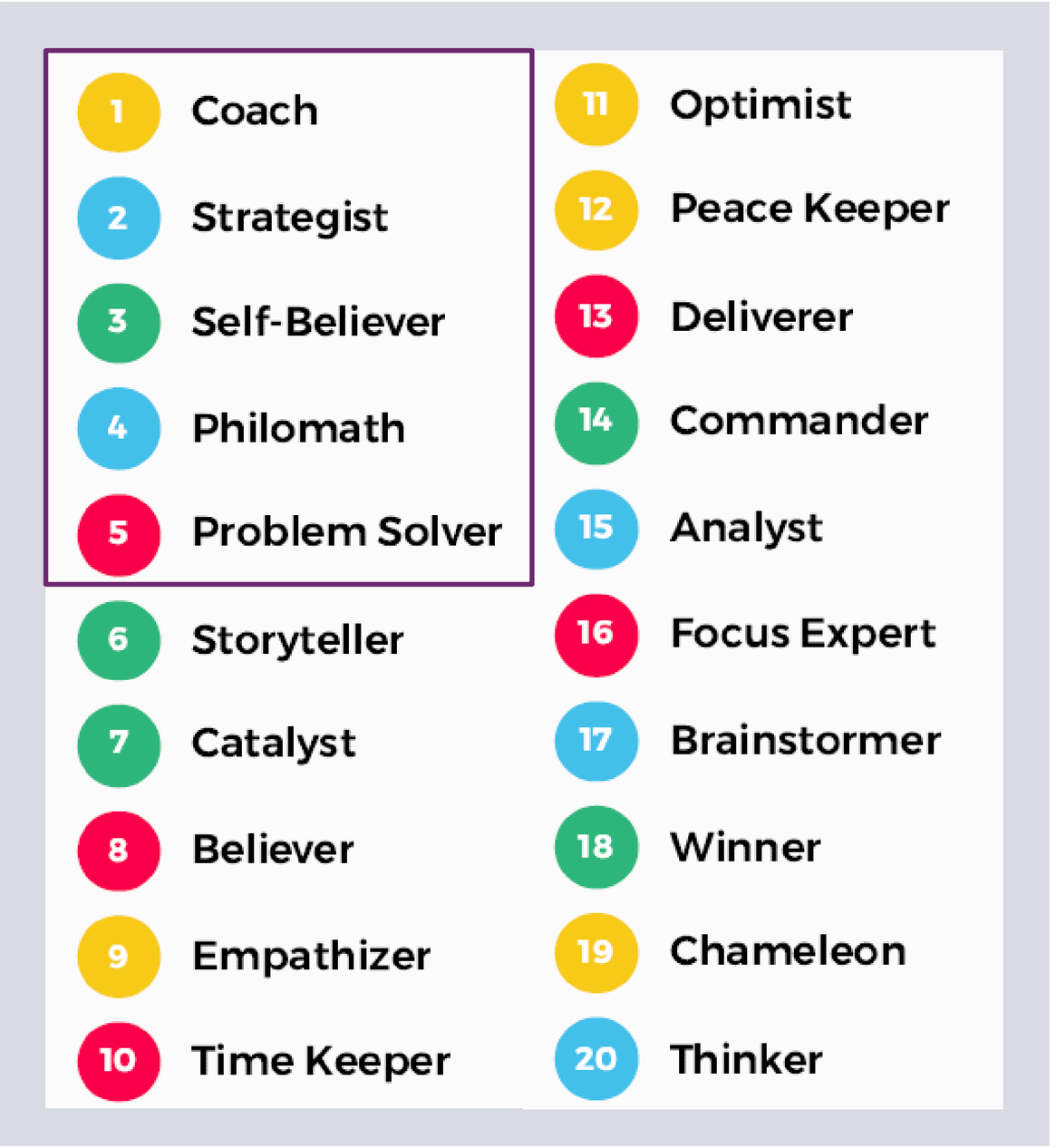
What complementary contribution would improve an important initiative in your firm?

Maximize the Strength. Manage the Watchout.

Useful contributions can become less effective when overused.

- **Coach:** Coaching can become rescuing
- **Commander:** Decisiveness can crowd out input
- **Analyst:** Analysis can delay time sensitive decisions

What is one of your watchouts and what adjustments could you make?



Different Futures. Different Leadership Needs

Revisit the leadership mix as the firm's challenges change.

ESTABLISH	SCALE	TRANSITION	REINVENT
Direction + Momentum	**Repeatable Success**	**Trust + Responsibility**	**Challenge + Change**
Catalyst + Strategist	*Deliver +Time-Keeper + Coach*	*Coach + Storyteller + Believer*	*Brainstormer + Analyst + Catalyst*

Every chapter needs complementary contributions.
Develop for the possibilities, not a single prediction.

Strengths Inform Development. Data Establishes Readiness.

Use insight to shape the experience, not to substitute for demonstrated capability.



Strengths help us explore:

- How someone may approach the work
- What support or partnership could help
- Where a development conversation could begin

Readiness requires evidence of:

- Relevant capability and judgment
- Responsibility exercised within clear boundaries
- Consistent follow-through in real work

Our Journey Today: Translate Strategic Ambition Into Leadership Capability

Make the connection between the future you want, and the experiences leaders need.



Strategic Ambition	Firm Evolution	Cultural Behaviors	Leadership Capability	Development Experience
What could we make possible?	What must change in how we create value?	What must we preserve, strengthen, or release?	What must leaders do differently?	Where can they begin practicing now?
Example				
Explore an AI-enabled advisory offering.	Shift from selling projects to demonstrating client outcomes.	Combine experimentation with professional accountability.	Develop technology judgment, new services, and change leadership.	Sponsor a bounded cross-disciplinary pilot.

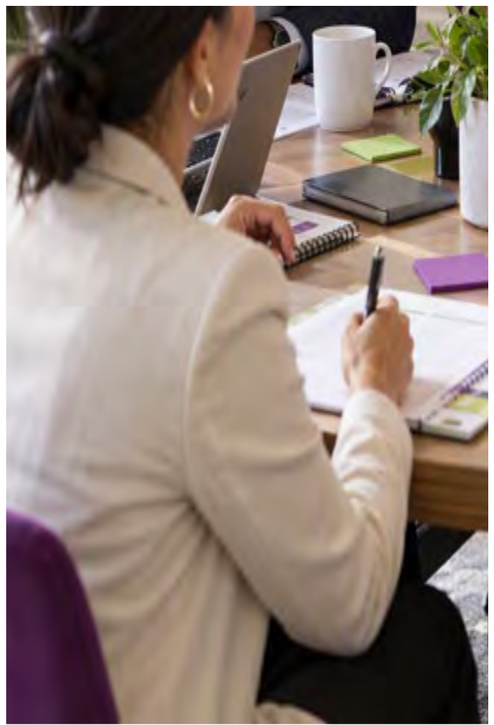
A Growing Firm. A Coming Transition. An Unprepared System.

Why succession cannot wait for a vacancy.

- Paralyzed by the “who” for their upcoming ownership and leadership transition in four years
- High future leader turnover
- Client relationships and important decisions concentrated with Co-Founders
- Starkly different culture across offices
- Lack of attention to and investment in innovation to overcome new competition

Change the starting question:
What must the next generation be able to do, and where can they begin practicing now?






Build Leadership Capacity Before You Need It

One connected process links strategy, strengths, development, data, and results.

ALIGN	ACTIVATE	STRETCH	REFLECT	RENEW
Translate strategy into leadership capabilities and continuity priorities	Explore strengths, complementary contributions, and cultural behaviors	Create real responsibility with authority, sponsorship, and support	Review business outcomes, learning, and evidence of continuity	Adjust the next experience as the firm and its needs evolve

Build capability through the work.
Make progress visible through a simple rhythm.

Which step is least deliberate in your firm today?

Build for the Plan. Prepare for the Alternatives.

Prioritize development of capabilities that remain valuable across plausible futures.

- **Across Every Future**
  Judgment, adaptability, trust, stewardship
- **If Growth Accelerates**
  Delegation, integration, change leadership
- **If Demand Contracts**
  Decisiveness, financial discipline, client relationships
- **For the Business Model Shifts**
  Experimentation, learning, strategic reinvention

Determine what should be developed now, regardless of which future occurs



Leadership Team HIGH5 Strengths Matrix

DOMAINS	MOTIVATING			FEELING					DOING				THINKING							
	Catalyst	Commander	Self-Believer	Storyteller	Winner	Chameleon	Coach	Empathizer	Optimist	Peace Keeper	Believer	Deliverer	Focus Expert	Problem Solver	Time Keeper	Analyst	Brainstormer	Philomath	Strategist	Thinker
Leadership Team Member 1							2	3			5	1			4					
Leadership Team Member 2												1		4		2		5	3	
Leadership Team Member 3							2		5		3	1						4		
Leadership Team Member 4			5				1	3			2	4								
Leadership Team Member 5	5						3				1	2			4					
Leadership Team Member 6	2	3					5					1		4						
Leadership Team Member 7		4	1								3	5		2						
Leadership Team Member 8	4											1		5	3	2				

Develop the Behaviors the Next Chapter Requires

Make the desired culture observable.

Learning

Test assumptions and share what is learned

Strengths to explore

Brainstormer | Philomath | Strategist

Accountability

Make commitments and follow through

Strengths to explore

Deliverer | Focus Expert | Time-Keeper

Leadership Behaviors Are Your Culture

Development

Help others take greater responsibility

Strengths to explore

Coach | Empathizer | Peacekeeper

Initiative

Act within clear decision boundaries

Strengths to explore

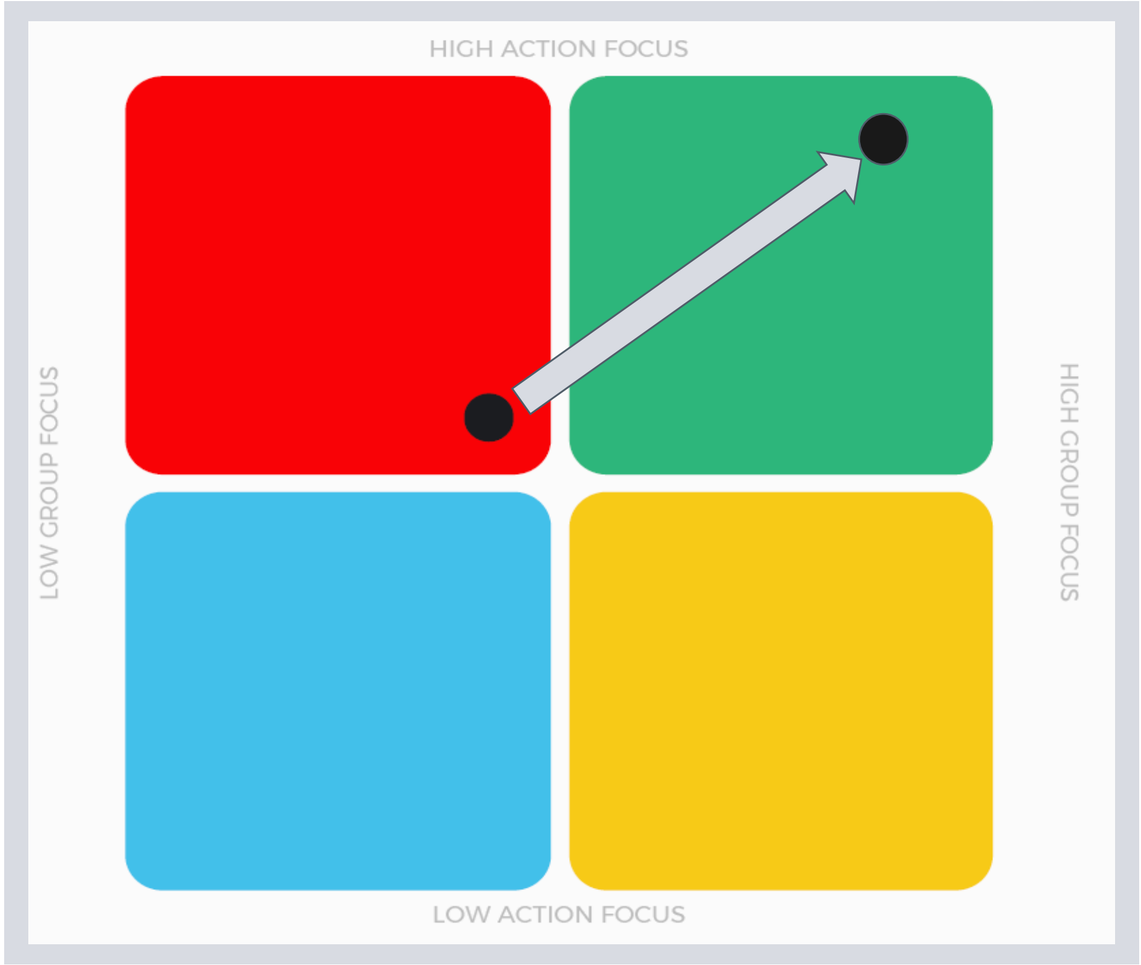
Catalyst | Storyteller | Commander

What cultural aspirations could you translate into observable behaviors?

The Future Firm Needs a Culture That Can Evolve

Culture evolves through what leaders enable, model, and reward.

- **Preserve:** Technical rigor and client trust.
- **Strengthen:** Excitement about and focus on creating the firm's desired future as well as effectively managing change.
- **Release:** The assumption that every important decision returns to a Managing Principal and what has made the firm successful will continue to do so.
- **Design:** Authority, incentives, and experiences that reinforce the shift.



Design Complementarity

Different contributions create value when they influence decisions and execution.

Design teams and initiatives so different perspectives create better outcomes (instead of replicating a single leader)

Matched future leaders with cross-office initiative to grow one culture:

- Clarify the shared business outcome
- Identify the different contributions needed
- Give each person meaningful responsibility
- Agree how decisions and disagreements will be handled
- Hold teams and individuals accountable separately

Which strengths do you typically look for in leaders?

Which complementary contributions do you need to make room for?





Develop for the Next Chapter, Not the Current Organization Chart

Different responsibilities require different development experiences.

EMERGING LEADERS	CURRENT LEADERS	TRANSITIONING LEADERS	FUTURE ROLES
Lead a bounded initiative	Take broader enterprise responsibility	Transfer relationships, knowledge, and authority and mentor leaders	Redesign responsibilities around the work ahead

What responsibilities in your firm need deliberate transfer or redesign before a transition?

Define the Evidence Before You Celebrate the Results

Track capability, continuity, and business value.

STRATEGIC COVERAGE	CONTINUITY	DEVELOPMENT ACCESS	BUSINESS VALUE	FOLLOW-THROUGH
Priority capabilities connected to active development experiences	Critical responsibilities with explicit transfer arrangements	Consequential opportunities extending beyond the usual few	Defined outcomes from development assignments	Reviews completed and next experiences adjusted

Measure the system, not just the existence of a succession plan.

What evidence would make your next succession discussion more substantive?

What Changes When Succession Becomes a Leadership Discipline

The first result is a different way of distributing responsibility.

FROM		TO
Informal assumptions about successors	→	Explicit capabilities linked to strategy
Relationships concentrated with Principals	→	Deliberate client stewardship experience teams
Development added to existing workloads	→	Bounded assignments with capacity and sponsorship
Authority retained by incumbents	→	Clear decisions others can genuinely own
Annual succession discussion	→	Monthly learning and quarterly renewal

Which shift would reduce your firm’s greatest continuity exposure?

Business Results Matter. Leadership Continuity Must Be Made Visible.

Outcomes from integrated strategy, leadership development, and succession planning

SUCCESSION EXECUTION & DEVELOPMENT

Transitioned: Two Co-Founders
Promoted: CEO, COO, and CTO, four VPs, six future leaders
Hired: CGO

GROWTH, EXPANSION & INVESTMENT

Three new offices, 7% profitability improvement, four investments in new services

EMPLOYEE ENGAGEMENT & COLLABORATION

Increases of 14% eNPS and 29% cross-office revenue in 12 months

FUTURE LEADER RETENTION

100% over 4 years with two boomerangs

What business outcomes could leadership development and succession planning efforts help advance for your firm?

Make It a Rhythm, Not an Event

Build leadership capacity through existing work and recurring decisions.

ALIGN	ACTIVATE	STRETCH	REFLECT	RENEW
What capability does the strategy require?	What strengths and complementary support can help?	What responsibility will create meaningful practice?	What do the results and experience tell us?	What should change next?

In the work: Activate + Stretch | Monthly: Reflect | Quarterly: Align + Renew

Where could this rhythm fit into a cadence you already have?

Choose Your First Leadership Development Move

Start small enough to act now and important enough to matter. Build on momentum.

- **ONE** future possibility
- **ONE** leadership capability
- **ONE** real-work opportunity
- **ONE** sponsor or complementary partner
- **ONE** next step and review date

Build the Leaders Your Firm's Future Needs

At the peer lab:

Turn strategy and strengths into a practical plan to strengthen your bench through meaningful responsibility

The most important step is the one you take before a transition makes it urgent.

What Would Make This Work in Your Firm?

Questions to help shape your firm and its future.

- What future are we not yet preparing leaders to create?
- What should we begin before a transition makes it urgent?
- Where would you begin if the bench is thin?
- How do you create development capacity when everyone is busy?
- What must current leaders release?
- How do you know responsibility is genuinely transferring?

Succession is not simply who follows you.
It is what becomes possible because you developed leadership before you needed it.

Growth & Ownership™ Strategies *conference*

Thank You!

Join Us for Friday's Roundtable at 11am

Cultivating Leaders on Purpose: Strengths-Based Succession Peer Lab

Explore your strengths

Continue the conversation

Visible Value®