

O.D.E.G.I.

TRANSITION MODEL

A GOAL-ORIENTED
SUCCESSION PLANNING MODEL
TO GUIDE MINISTRY BOARDS

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O.D.E.G.I. Model

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WHAT IS THE O.D.E.G.I. MODEL?

The O.D.E.G.I. Model is a holistic planning methodology specifically designed to guide organizational leaders as they navigate key succession related conversations.

Created by Will Heath, O.D.E.G.I. is an acronym that represents five specific outcomes that must be achieved for succession to be successful: **orient, design, evaluate, gather, implement.**

O	ORIENT Thinking
D	DESIGN a Strategy
E	EVALUATE Critical Areas
G	GATHER Key Leaders
I	IMPLEMENT The Plan

WHY THE O.D.E.G.I. MODEL?

Succession planning is a complex, often emotional process. Addressing organizational concerns while leading people through the process requires a unique leadership perspective, appropriate levels of transparency, and a robust set of tools. Applying this model enables a Board to take a holistic approach in planning a leadership transition.



O.D.E.G.I. AND THE 6 SUCCESSION CONVERSATIONS

The phrase "succession planning" is often used to facilitate six distinct conversations. The lack of specific language around each of the six areas creates a challenge in planning and implementation. The absence of precise language is one of the most significant barriers to transition planning.

To bring an appropriate level of specificity to the succession planning conversation and open the power of The O.D.E.G.I. Transition Model, an essential first step is to clearly define the succession planning conversation your team is attempting to navigate.

Conversation	Topic of Discussion
Proactive Exit Planning	Helping a transitioning leader, and their spouse, prepare for their next season of influence
Protecting Organizational Continuity	Anticipating and addressing potential areas that could be disruptive during a season of transition
Transition Strategy Management	Establishing a defined plan for how to project manage the leadership transition process
New Leader Hiring	Developing a profile, advertising the position, vetting candidates, negotiating the offer, and onboarding of the successor
Communicate Transition Effectively	Communicating in such a way as to embed confidence in the process and continued investment into the ministry
Emergency Transition Management	Writing a policy that guides the preparation for and response to an unplanned transition.



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The **O.D.E.G.I. Transition Model** provides a robust methodology for addressing each succession planning conversation.

- **Orient** the Board's awareness of the scope of questions that must be addressed within each of the six conversations
- **Design** a strategy that establishes the sequence of work to accomplish
- **Evaluate** critical areas perceived as having the highest potential for disruption during the transition process
- **Gather** key leaders to ask for feedback, solicit continued support, and challenge to make strategic investments where necessary
- **Implement** the plan with clarity, confidence, and humility

Healthy and robust collaboration is necessary for succession planning to be effective. The 6 Succession Planning Conversations provides a level of precision required to ensure that crucial areas are covered. **The O.D.E.G.I. Transition Model** offers structure and a sense of movement that gives confidence that progress is happening.

The O.D.E.G.I. Transition Model is a guide to navigate each conversation while enabling your team to anticipate areas that could become disruptive during implementation. With this understanding, the team will be able to effectively address obstacles, provide coaching for key leaders, and communicate where the process is going.

The O.D.E.G.I. Model is useful in:

- Identifying and prioritizing core questions the Board should address
- Creating a plan of action for how to move each conversation forward
- Anticipating areas where the organization is not prepared to handle the stress brought on by a critical leader transition
- Helping the Board, Staff, Key Influencers, and Strategic Partners navigate succession.
- Establishing a culture of healthy transition at every level within the organization





IMPLEMENTING THE O.D.E.G.I. MODEL - STEP 1

The first step is to identify which of The 6 Succession Conversations to focus on at this time.

Instructions:

1. Determine who, in addition to the Board, should participate in this exercise.
2. As a group, read through the description provided for each conversation.
3. In the "Personal" column, each person marks the two (2) conversations they feel are most important at this time.
4. Each person shares their top two selections. Use tally marks in the "Group" column to capture everyone's input. (*Consider using a whiteboard or flip chart to tally responses*)
5. As a group, prioritize the order in which you will begin addressing each conversation.

6 Succession Planning Conversations	Personal	Group
Proactive Exit Planning Helping a transitioning leader, and their spouse, prepare for their next season of influence		
Protecting Organizational Continuity Anticipating and addressing potential areas that could be disruptive during a season of transition		
Transition Strategy Management Establishing a defined plan for how to project manage the leadership transition process		
New Leader Hiring Developing a profile, advertising the position, vetting candidates, negotiating the offer, and onboarding of the successor		
Communicate Transition Effectively Communicating in such a way as to embed confidence in the process and continued investment into the ministry		
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IMPLEMENTING THE O.D.E.G.I. MODEL - STEP 2

Now that you have identified the succession conversations to focus on, it is time to move into the Orient phase of **The O.D.E.G.I. Transition Model**. Here is a summary of specific questions designed to orient the Board to particular topics within each succession conversation.

Conversation	Area of Orientation
Proactive Exit Planning	<ul style="list-style-type: none">• Does the transitioning leader have clarity and conviction as to what their next season of influence is?• Is the transitioning leader financially prepared to enter into their next season? (This topic relates specifically to retirement-based transitions)
Protecting Organizational Continuity	<ul style="list-style-type: none">• What can we learn from our history as we make plans to move forward?• What are the biggest challenges we must address?• Where are we headed?
Transition Strategy Management	<ul style="list-style-type: none">• What are the different pathways to follow when implementing a transition?• What key areas do we should we account for during the implementation of a transition plan?
New Leader Hiring	<ul style="list-style-type: none">• What are the elements of navigating a search process?
Communicate Transition Effectively	<ul style="list-style-type: none">• When do we begin communicating?• What is the appropriate pace for disclosing information?
Emergency Transition Management	<ul style="list-style-type: none">• How do we write a policy that guides our response to an unplanned, emergency?

VISIT OUR WEBSITE TO LEARN HOW WE CAN HELP YOU

Sherpa has developed online coaching tools to assist in the Orient and Design phases of **The O.D.E.G.I. Transition Model**. We also offer virtual coaching to assist with the Evaluate, Gather, and Implement phases.

<https://planningsuccession.com/the-6-conversations>