

SUCCESSION ROLE PROFILE TEMPLATE

ROLE TITLE: CEO/PRESIDENT REPORTS TO: BOARD/INVESTORS BUSINESS AREA: SERVICE/MANUFACTURING

<i>Outline of Role</i>	<i>Key Objectives</i>	<i>Knowledge and Experience</i>	<i>Skills</i>
<p>Purpose: Organization's primary business mission/focus (e.g., Service, Manufacturing, Product, etc.) Small, Medium, Large Organization</p> <p>Culture/Values: Family/Partnership/Manager Driven Investor/Board Involvement Entrepreneurial vs. Bureaucratic Pressure Commitment Employer/Employee Attitude Organization Demographics High Tech vs. Low Tech Business</p> <p>Organization Context: What are the main priorities facing the CEO/President during the first 6 months, 1 year, 5 years. What type of leadership is needed?</p> <p>Developmental Stage: Start-up, growth, transformation, restructuring, etc.</p> <p>External Environment: Market opportunities, competitors, growth/retraction, evolution, etc.</p>	<p>Key Outputs: The results the role holder is expected to achieve – i.e. what has to be done and why.</p> <p>At least 3 measures which can be used to gauge performance in this role – start with an action verb leading to an outcome which is specific and measurable:</p> <p>For example: achieving X % growth in 12- 18 months; increasing investor participation to build up capital for the firm.</p> <p>Relationships/stakeholders: The internal and external contacts which directly affect the activities of this role holder:</p> <ul style="list-style-type: none"> • Family Members • Partners • Board/Investors • Clients • Vendors/Suppliers • Unions 	<p>In this section it is important to question and challenge assumptions about the role. Think about the minimum that would enable effective performance of the role's requirements from day 1.</p> <p>Technical Skills & Knowledge Specific aspects of skill or knowledge which may have been achieved through work experience and which are essential to achieve the Key Outputs</p> <p>Experience Two or three areas of experience which are a minimum or essential requirement for effective performance in the role – e.g.</p> <ul style="list-style-type: none"> • specific functional background • industry specific experience <p>Qualifications Specific formal qualifications that are either required by legislation/regulation or are <u>essential</u> to perform the job competently</p>	<p>Competencies: The behavioural competencies the role holder will need to achieve the required results.</p> <p>Key Output Bias: Leader vs. Manager/Doer Relationship vs. Product Driven Innovation vs. Execution Interpersonal Skills Communications/Presentations</p> <p>Additional considerations for success: Internal vs. external hire Economic environment Cultural Fit Personality Factors Timing and sequence of transition</p>