

CEO Transition Communications Checklist

Below are communications actions any comms leader should consider as part of the first 100 days of onboarding a new CEO:

Pre-Day 1
<ul style="list-style-type: none"> <input type="checkbox"/> For outgoing CEO (if applicable): Determine how outgoing CEO will communicate departure to organization/street – and what internal announcements need to be sent
<p>Prep incoming CEO:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create digital files or hard-copy binder outlining relevant issues facing the CEO that will help the leader navigate the new organization. Content can include org charts, operating model overviews, comms channel overview; high-level messaging and overviews of key functional project and initiatives; recent press releases or organizational statements <input type="checkbox"/> Outline urgent/hot-button issues/burning platforms or other crises and provide context <input type="checkbox"/> Ensure leader has mobile and desktop access to all internal information/collaboration tools and channels, including intranet, email, social platforms and apps
<ul style="list-style-type: none"> <input type="checkbox"/> Create CEO transition plan – Day 1 – 100, internal and external. Audiences should include: <ul style="list-style-type: none"> o Customers o Employees (segmenting audiences as appropriate, e.g., managers, Employee Resource Groups, etc.) o Media and influencers o Investors o Suppliers o Government relations contacts o Association/industry contacts o Others TBD
<ul style="list-style-type: none"> <input type="checkbox"/> Identify key members of the senior leadership teams and function leads and schedule 1:1 meetings in advance of CEO joining the organization
<ul style="list-style-type: none"> <input type="checkbox"/> Discuss news exclusive for CEO announcement. Media training, if needed
Day 1 / Week 1
<ul style="list-style-type: none"> <input type="checkbox"/> Distribute toolkit for people managers to communicate and cascade key information about the transition
<ul style="list-style-type: none"> <input type="checkbox"/> Distribute press release; schedule media tour/interviews
<ul style="list-style-type: none"> <input type="checkbox"/> Update external sites: Company website profile and LinkedIn profile
<ul style="list-style-type: none"> <input type="checkbox"/> Announce internally to all employees via email, video or other communication
<ul style="list-style-type: none"> <input type="checkbox"/> Host town hall to introduce new CEO (within first week)

Month 1

Articulate:

- **Broad comms vision/audience engagement with new CEO:** How leader wants to authentically engage with team, employees, customers, business partners and external audiences. Discuss comms engagement - preferred comms approach; general workstyle, how & when leader wants to be briefed/engaged; current process
- **Ongoing “burning platform” messaging (internal/external):** Address any briefing book questions; highlight issues that need to be addressed over the next six months, share background and proposed action. (Note: any short-term action should be part of 100-day CEO transition plan.)
- **Key business priorities and supporting comms strategy;** Propose formal leadership engagement process

Understand how:

- **CEO wants to regularly connect with Board Members/SLT** and begin building plan/tools/channels/guidelines to facilitate these connections
- **CEO hopes to engage with employees** and begin building plans/tools/channels facilitate (social/email, etc.)
- **CEO wants to regularly connect with external audiences** (media, business partners, customers, community) and begin building plan/tools/channels/guidelines to facilitate these connections

- **Distribute second leadership communication (video or note),** sharing CEO background/credentials and topline observations; Why leader is excited to join the organization

- **CEO visits all key sites – employee locations, customers, etc.** (or arranges for visits in upcoming weeks); Holds small team listening sessions at each internal location

Month 2

- **Identify/articulate CEO focus areas/provide short-term strategic comms plan (3-6 months)**

- **Conduct debrief regarding leadership video or Town Hall meeting and early listening sessions;** share insights/key learnings with leader

- **Distribute third all-employee communication (video or Town Hall meeting)** to share, what CEO is hearing/learning from field locations and employees to date; leadership tenets; upcoming listening tour stops

Continue:

- CEO **site visits**/listening sessions
- building formal, **long-term strategic comms platform** development and planning

Articulate:

- **Thought leadership** areas/define success
- CEO **legacy** goals

Month 3	
<ul style="list-style-type: none"> □ Develop/present/refine longer-term leadership messaging platform supporting key focus areas: <ul style="list-style-type: none"> ○ Share leader video or letter with employees, reporting back what CEO has learned/heard in first 100 days; vision and key focus areas; how leader will support customers and business partners; employee call-to-action ○ Publicly share leader’s general business priorities (via owned external channels/media platforms) □ Continue to refine longer-term strategic comms plan (internal/external) (first 12 months, including CEO calendar, external editorial calendar and channels; This should be shared within 120 days) 	
<ul style="list-style-type: none"> □ Create/present budget proposal for any new supporting comms tactics/channels/tools (based on strat plan) and then: <ul style="list-style-type: none"> ○ Build out/launch communications channels for employees to connect with leader ○ Build out communications channels for customers/business partners to connect with leader 	
<ul style="list-style-type: none"> □ Conduct business priority deep-dive interviews with functional leads to secure alignment before finalizing long-term comms strat plan 	
<ul style="list-style-type: none"> □ Present year-long strategic comms platform and strategic comms plan supporting key business priorities and articulating leadership vision and focus areas and articulate employee touch-point plan 	
<p>Continue:</p> <ul style="list-style-type: none"> ○ Business priority/thought leadership/legacy conversations ○ CEO site visits/listening sessions and sharing learnings to date 	
<ul style="list-style-type: none"> □ Begin CEO “story mining” interview process to gather supporting stories to be used both internally and externally to underscore leader’s commitment to business priorities and key messages 	

Updated: 2/10/2021