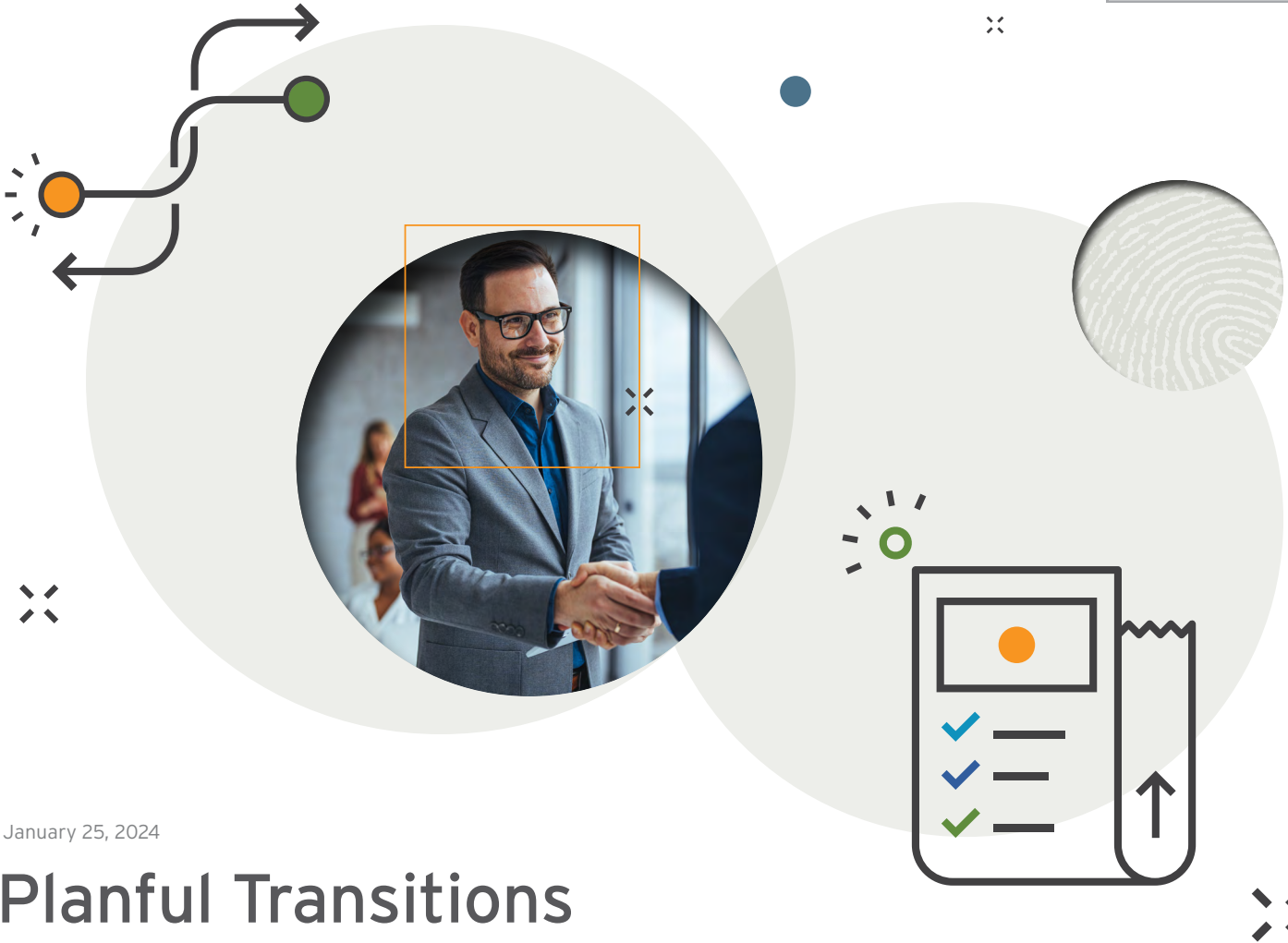




January 25, 2024

Planful Transitions

BEST PRACTICES

Written by: Jesse LaDousa, Chief Executive Officer

As I mentioned in my December [article](#), I have taken a new role on at Clientek this year, stepping in as CEO. While this is certainly a big milestone for me personally, and for Clientek after 31 years of Kirk's leadership, it didn't just happen the last week of December leading up to the announcement.

One of the things I am most proud of is the transition team and plan we put together. Kirk and I had been talking about this leadership change for years before ever putting the plan in motion. Once we settled on a target date, it gave us just over 14 months to plan and execute the transition. Our transition was not as simple as Kirk --> Jesse. We had numerous people in the organization leaving key roles, and new people moving into those roles.

Our overarching goal was simple: when the day arrives, outside of the announcement, no one should know a big transition occurred. That meant we had to plan and execute all the necessary activities well ahead and ensure that by

January 1st, all the new roles were filled, and everyone was already doing the job.

One thing we do very well at Clientek is prepare, plan, and execute. We treated this like any other project we take on. We identified goals, objectives, and determined how we would measure success. We identified the stakeholders, both internal and external, that were going to be required. We evaluated all the current state artifacts and processes that would need to change and identified the gaps that needed to be addressed. From this, we built a backlog, prioritized it, and got to work.

During the transition we had periods that required a flurry of activity and periods where we were working with other stakeholders to complete tasks on our behalf. We tracked our work using weekly standups and doing retros as large "features" were completed.

By September of last year, we had accomplished our backlog and left ourselves time for several months of UAT. While we made some small adjustments to a few of the processes and aligned duties to people differently than originally planned, our UAT period went smooth and when January 1st rolled around, we were able to celebrate and get back to work.

The success of this transition could not have been accomplished without the initial upfront planning that occurred many (many) months before the date itself. Just as with all our projects, time spent building a plan is never wasted.

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