

THE OPERATOR SEAT

TRANSITION ACTION PLAN

The Foundation (1-2 months)

Date: _____ to _____

Step 1: Define Your Future Role

- ☐ Complete the diagnostic assessment ([Part 1](#)) to confirm it is time to transition.
- ☐ Define your future role within the company
- ☐ Share your role definition with key stakeholders or a trusted advisor for accountability

Step 2: Audit & Assess

- ☐ Audit all current responsibilities
- ☐ Categorize into A/B/C/D buckets
- ☐ Identify gaps in the current leadership team

Step 3: Manage the Identity Shift

- ☐ Build an intentional checklist of how you will fill your time (e.g., board seats, mentoring, investing, philanthropic work, hobbies)
- ☐ List three concrete actions you will take in the next 6 months to start building this new chapter

Digital Separation:

Start with intentionality to separate your personal email and files from the business

- ☐ Select a new hosting company and set up a personal domain (e.g., initials@companyfounder.com)
- ☐ Move all personal photos, tax returns, and bank statements fully off company servers/email
- ☐ Begin sending all personal, board, and networking correspondence from this new address

Step 4: Identify and Develop Your Successor (1-6+ months)

Date: _____ to _____

- ☐ Decide whether to pursue an external hire or internal promotion
 - ☐ If external: draft role description for next-chapter needs
 - ☐ If internal: assess readiness and development needs
- ☐ Begin successor search or development plan
- ☐ Consider using an executive search firm specializing in CEO searches (e.g., Heidrick & Struggles)
- ☐ Begin interviewing external candidates (if applicable)
- ☐ Draft communication plan for team, customers, and partners
- ☐ Schedule a check-in with a trusted advisor for accountability

Transition of Responsibilities:

Begins when your successor is ready to assume the seat

- ☐ **Months 1-2:** Introduce successor to key stakeholders and gather feedback
- ☐ **Months 3-4:** Systematize and transition Category D responsibilities.
- ☐ **Months 5-6:** Transition Category C responsibilities to functional leaders so you are down to an optimized "Category B" list.

Timeline Expectations Based on Path

Path A1 (Internal COO Trial):

- **Month 3:** Promote internal candidate to COO.
 - Set 6-month and 12-month milestones.
- **Month 7:** Assess progress against 6-month milestones when COO is 4 months into role.
 - If off track, pivot to Path A2.
 - **Month 9:** If still on track at 6 months into role, continue the trial toward the 12-month mark.
- **Month 15:** if 12-month promotion criteria are met, begin Step 5 transition process.

Path A2 (Failed COO Trial):

- **Month 3:** Promote internal candidate to COO.
 - Set 6-month and 12-month milestones.
- **Month 7:** Assess progress against 6-month milestones when COO is 4 months into role. If off-track, begin outside search
- **Months 7-9:** Spend ~2 months hiring a search firm and developing the job description.
- **Months 9-11:** Expect 2 months to start seeing candidates, followed by interviews, notice periods, and onboarding in Months 11-14.
 - *Note that the candidate will likely need to give notice for their current position.*
- **By the end of Month 14:** the new hire should be starting the Step 5 transition process.

Paths B & C (External Search):

- **Months 3-5:** Initiate process with a search firm and begin developing job description.
- **Months 5-7:** Expect ~2 months to start seeing candidates, followed by interviews, notice periods, and onboarding in Months 7-10.
 - *Note that the candidate will likely need to give notice for their current position.*
- **By the end of Month 10:** the new hire should be starting the Step 5 transition process.

Step 5: Execute the Transition (12 months)

Begins when internal COO promoted into CEO seat or when outside CEO is hired

Date: _____ to _____

☐ **Months 1-3 (Shadow Period):**

Successor observes. You make the final calls and debrief weekly.

☐ **Months 4-6 (Reverse Shadow):**

Successor makes decisions. You observe, coach, and stop attending operational meetings.

☐ **Months 7-9 (Full Transition):**

Successor is fully in the operator seat. You shift entirely to your newly defined role (Category A tasks only).

☐ **Months 10-12 (Independence):**

The business runs without your regular input. Authority levels are explicitly defined.

Steps 6-7: Establish Rhythms & Resist the Pull (Ongoing)

Date: _____ to _____

- ☐ Establish your new communication cadence (e.g., weekly 1:1s moving to monthly, quarterly strategy sessions).
- ☐ Rely on structural friction (working from a different location, removing yourself from operational channels) to resist the gravitational pull to jump back in.
- ☐ Channel all team feedback through your successor to protect their authority.
- ☐ Give it time to be different. Evaluate based on "is this working?" rather than "is this how I would do it?"
- ☐ **Final Digital Separation:** Separate personal tech (new email/port history and files not company-specific). Move tax returns, photos, investments, etc., fully off company servers.