

How to Use Past Decisions to Prepare Future Leaders

Retrospective decision mapping for leadership succession

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Abstract. Leadership succession involves preparing future leaders to assume a role and exercise their authority by drawing on the judgment, information, relationships, and understanding of risk the role requires. Retrospective decision mapping provides a structured way to examine a significant past decision, make more of that knowledge visible, and translate the findings into practical developmental experiences for future leaders.

A future leader can receive a title, a job description, and formal authority and still be unprepared for the decisions that define the role. Experienced leaders often draw on years of accumulated knowledge: which questions deserve attention, whose judgment to seek, what information is reliable, how much uncertainty is acceptable, and when a matter requires consultation or approval. Because this reasoning has become familiar, parts of it may never have been made explicit.

This creates a practical challenge for family enterprises, family offices, and family foundations. A transition may alter titles or reporting relationships while leaving the underlying decision system largely unexamined. The incoming leader then has to infer how important decisions are actually made, often while the incumbent leader is attempting to step back.

Role descriptions, governance documents, and authority matrices are useful. They identify what a role is responsible for and where formal authority resides. They seldom capture the judgment required to exercise that authority well. One way to uncover that judgment is to begin with a real decision and reconstruct how it unfolded.

Begin with a consequential decision

Retrospective decision mapping is a facilitated exercise in which participants reconstruct a consequential past decision. The decision should be complete enough to examine, important enough to reveal how leadership actually works, and relevant to responsibilities a future leader may assume.

A family enterprise might examine an acquisition, a major capital investment, a market entry, or a divestiture. A family office might reconstruct an investment decision, a change in distribution policy, or the addition of a new service. A family foundation might study a major grant, a shift in mission, or a decision about who participates in grantmaking. Starting with a bounded event keeps the discussion concrete while allowing larger patterns to emerge.

The accompanying field guide organizes the reconstruction into five fields:

Phase or stage

How did the opportunity or issue evolve? What were its principal stages?

Decision or question

What was being explored, recommended, approved, rejected, or deferred at each point?

Involvement and information

Who participated, and which analysis, experience, data, or relationships mattered?

Understood outcome

What did participants believe had been decided, and what authority followed?

Uncertainty or ambiguity

What remained unclear about scope, risk, conditions, authority, or next steps?

The resulting map traces how the decision evolved by showing the questions being answered, the people and information involved, the outcomes participants understood, and the uncertainties they were managing.

What the reconstruction can reveal

Mapping a decision often reveals elements of leadership that are difficult to see in an organization chart. A senior leader may have recognized a risk that others discounted, introduced a relationship that changed the available options, or distinguished between an acceptable exploratory commitment and a much larger development risk. The leader's formal authority may be documented, while the reasoning behind its use remains largely tacit.

The exercise can also show where the participants held different understandings. One person may recall a response as approval to proceed. Another may remember approval subject to conditions. A third may have viewed the same exchange as permission to gather more information. These differences deserve attention because they reveal where the meaning of a decision, the authority that followed, or the conditions for reopening it were not uniformly understood.

The map should therefore be treated as a provisional reconstruction rather than a verdict on the past. The facilitator first establishes a neutral chronology, then invites corrections and alternative interpretations. Where the historical record cannot be resolved, the group can record the differing views and ask what a future process should require.

Ambiguity itself should be examined with care. Consequential decisions rarely become free of uncertainty. The useful question is which ambiguities must be accepted, which can be reduced through additional information or consultation, and which should be explicitly managed through conditions, limits, or review points.

From organizational history to leadership development

The exercise becomes most valuable when the group converts the reconstruction into requirements for the future. Participants can ask what judgment the current leader contributed, which relationships and sources of information were decisive, and what a future leader would need to understand before handling a comparable decision.

This analysis can identify decisions that an emerging leader could begin owning now, along with appropriate limits and escalation triggers. It may show that the future leader needs greater exposure to a particular market, professional discipline, family constituency, or outside advisor. It can also reveal operating practices that support continuity, such as recording recommendations, confirming conditions attached to approval, naming the authority that follows a decision, and identifying when the matter should return for review.

The result is a form of decision apprenticeship. Judgment develops through experience supported by reflection and feedback. A future leader might first observe how a particular decision is framed, then develop a recommendation, lead part of the analysis, make a bounded decision, and eventually assume fuller authority. The map helps the incumbent and the future leader choose those experiences deliberately.

This approach can also make succession discussions less abstract. Conversations about titles, timing, and readiness sometimes become entangled with identity, status, or fear of loss. Examining a real decision allows the group to ask a more practical question: What would someone need to know, demonstrate, and practice to handle the next decision of this kind well?

Applications across family systems

The method is adaptable because every family system contains consequential decisions whose logic extends beyond formal policy. In a family enterprise, the map may clarify how owners, directors, executives, and family leaders interact around strategy and capital. In a family office, it may reveal how investment judgment, family preferences, fiduciary responsibilities, and service priorities are integrated. In a family foundation, it may uncover how mission, community knowledge, family values, and generational voice influence grantmaking.

The developmental implications vary across settings. The core questions remain consistent: Who needs to contribute? What information and relationships matter? Who has authority? What conditions or limits apply? How will the outcome be confirmed? What experience would prepare someone else to exercise sound judgment the next time?

A practical starting point

Retrospective decision mapping provides a disciplined way to extract lessons from one important decision. Mapping additional decisions can reveal other dimensions of leadership judgment, particularly when the decisions involve different forms of risk, authority, or stakeholder relationships.

For families and their advisors, the method offers a concrete bridge between succession planning and leadership development. It makes more of the current decision system visible, identifies what should be preserved or clarified, and helps translate the transfer of responsibility into experiences through which future leaders can build judgment.

The accompanying field guide provides a practical structure for selecting a decision, building the map, facilitating the discussion, and extracting the succession implications.

About the Author

Paul Edelman, PhD, PCC, is an executive coach, facilitator, and family enterprise advisor. He helps leaders, families, and advisory teams think clearly and work constructively through consequential decisions and leadership transitions.