

# Transferring Meeting Leadership

*Using recurring meetings to develop judgment, authority, and follow-through*

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## Abstract

Recurring management meetings provide opportunities for emerging leaders to develop judgment, exercise authority, and learn to lead colleagues. A meeting leadership handoff makes those opportunities more deliberate. By clarifying the chair's responsibilities, the incumbent's contribution, decision boundaries, and a small set of working practices, a leadership group can test a new arrangement and learn from its experience. The approach is adaptable to family enterprises, family offices, and family foundations.

Leadership transitions often become visible in ordinary management meetings. A founder or senior leader may continue setting the agenda, directing discussion, and determining what happens next even as other executives assume greater responsibility. An emerging leader may have substantial operating experience but limited opportunity to lead a group through a consequential discussion or decision.

A recurring meeting provides a manageable setting in which to change that arrangement. The incoming chair can take responsibility for preparation, discussion, and follow-through while the incumbent remains available to contribute experience. Repetition makes it possible to observe what happens, adjust the arrangement, and provide progressively greater responsibility. The experience may also help the incoming leader assess an interest in broader leadership responsibilities.

Begin with the meeting's actual purpose and the needs of the people who participate. The exercise does not require a predetermined succession outcome, a new title, or an assumption that existing meetings are ineffective. It provides a way to examine current practice and agree on a useful next step.

## Begin with a real meeting

Choose a recurring management meeting that involves meaningful coordination, judgment, or decisions. Ask the incumbent, prospective chair, and relevant participants what the meeting is intended to accomplish. What work requires the group's collective attention? Which matters are appropriately handled by individuals or smaller groups? What already works well, and where would greater clarity or a different practice help?

Review a recent agenda and the way decisions and actions were carried forward. This can reveal whether participants share an understanding of the meeting's purpose, what preparation is useful, and how an item moves from discussion to a decision or next step. The facilitator can ask for examples rather than begin with a general assessment of whether the meetings are effective. Invite the prospective chair to describe the responsibilities they would welcome and the preparation or support that would make the trial useful.

## Clarify the handoff and decision boundaries

The incumbent and incoming chair can begin by agreeing on the responsibilities involved in leading the meeting. These may include developing the agenda, deciding how items will be prepared and presented, managing the discussion, drawing out relevant perspectives, confirming outcomes, and ensuring that unresolved matters return for attention. Some responsibilities may remain with an executive assistant, chief of staff, or other process-support person. The chair remains responsible for the quality of the process without having to perform every administrative task.

Chairing a meeting does not automatically confer authority over every decision considered there. For representative items, clarify who decides, who develops a recommendation, whose judgment must be sought, and who needs to be informed. Identify financial, legal, governance, or other limits that require approval or escalation. A meeting may include matters the group can decide, recommendations to a senior leader or governing body, and decisions delegated to individual executives. The relevant governing documents and formal responsibilities continue to apply.

The incumbent's role also needs definition. Will the senior leader attend every meeting, participate only in selected items, or remain available for consultation? Which matters require early involvement, and which can proceed without informal approval? The agreement can clarify how the incoming chair will exercise responsibility while retaining access to the incumbent's experience.

### **Select a few meeting practices**

The leadership group can examine a small set of practices that would improve the connection between preparation, decisions, and follow-through. Candidate practices include identifying the type and intended outcome of each substantive agenda item; providing brief context, a responsible presenter, and relevant pre-reading; recording significant decisions and their conditions; assigning actions with an owner and due date; returning unresolved matters to a subsequent agenda; and assigning one person to maintain and circulate the meeting record.

Invite participants to select the practices they consider most useful, then examine what implementation would require. A simple ranking or vote can help the group choose two or three to test. Ask what the lightest workable version would look like, who will maintain it, when it will begin, and when the group will review it. The aim is to improve the meeting's work without creating unnecessary paperwork.

A useful decision record distinguishes the question considered, the decision or recommendation reached, the authorized decision maker, and any material assumptions or conditions. Where further approval is required, record its status, scope, and target response date. An agreed trigger for reconsideration can be recorded separately from the reason a decision is eventually reopened. Record a responsible owner, due date, status, and any important blocker or dependency for each resulting action. The group can adapt an existing workbook or use a simpler record if that is sufficient.

### **Use the incumbent's judgment constructively**

Before the trial, the incumbent and incoming chair can review the agenda together and identify matters on which the senior leader's experience may be especially useful. During the meeting, the incumbent can ask questions, offer relevant information, and identify risks while allowing the chair to manage the discussion. When an issue requires the incumbent's decision, the senior leader makes that decision explicitly and confirms the outcome.

The incoming chair may occasionally lose the thread, miss a relevant consideration, or allow a discussion to continue without a clear next step. These are opportunities for learning. The incumbent can provide a prompt or offer assistance, particularly when a material risk or authority boundary is involved, and return leadership of the process to the chair. A brief conversation afterward can examine what the chair noticed and how a similar situation might be handled next time.

### **Review the trial and develop capability**

After the meeting, the incoming chair and incumbent can reflect on the experience, ideally before offering the group a broader assessment. What was the chair trying to accomplish? What happened when the discussion became difficult or an unexpected issue arose? Which contributions were useful, what required adjustment, and what would the chair try differently? Ask about the sequence of events and available information rather than invite retrospective justifications.

The group can also examine whether the meeting produced the intended outcomes. Were decisions and recommendations clear? Did participants understand their responsibilities and the status of unresolved matters? Were important perspectives considered, and did actions receive appropriate ownership and follow-through? When participants disagree with a decision, the review can examine how the chair managed the disagreement, whether relevant views were considered, and how the decision and any remaining concerns were handled. Use the review to agree on a practical next step. The incoming chair might assume more responsibility for agenda design, lead a more consequential discussion, or take ownership of a bounded class of decisions. The incumbent may reduce involvement in preparation while remaining available for consultation. Further experience can reveal both developing capability and the incoming leader's preferences. The exercise can support an informed conversation about future responsibilities without turning each meeting into a public verdict on readiness.

### **Applications across family systems**

In a family enterprise, the exercise may help a founder transfer responsibility for an executive or directors' meeting while remaining involved in selected strategic matters. In a family office, it may support an emerging leader who is beginning to chair an investment, service, or family-governance meeting. In a family foundation, it may help a next-generation trustee or committee chair lead discussions about grants, priorities, or participation while respecting the authority of the board and other governing arrangements.

The meeting's purpose and authority arrangements will differ. The developmental questions remain useful: What responsibilities can the incoming leader begin assuming? What experience and support will help? How can the incumbent contribute without unnecessarily retaining control of the process? What will the group learn from the trial, and how will that learning inform the next transfer of responsibility?

### **A practical starting point**

Begin with one recurring meeting and a willing incoming chair. Review current practice, agree on the handoff and decision boundaries, and choose a small number of meeting practices to test. Identify the person who will maintain the record, the first meeting in the trial, and a review point after several meetings. A short written agreement can capture the roles, boundaries, practices, and next steps without requiring a comprehensive meeting manual.

The exercise complements retrospective decision mapping, enterprise timeline mapping, and decision authority mapping. Those methods can help make accumulated experience and judgment more visible and clarify how authority may evolve. A meeting leadership handoff provides a recurring setting in which emerging leaders can put that learning to work. The accompanying field guide provides a structure for defining the handoff, running the trial, and extracting the leadership implications. An optional agenda, decision, and action workbook can support the process when the group finds it useful.

### **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.