

Is Your Association Ready? An Executive Succession Readiness Toolkit  
Presented by Greg Wilson, CAE  
at the Associations West annual conference, Newport Beach April 2026

## Executive Assessment Tools Overview

### DiSC (Dominance, Influence, Steadiness, Conscientiousness)

*How someone shows up and communicates*

**What it measures:** DiSC focuses on observable workplace behavior—how individuals respond to challenges, interact with others, handle pace, and approach rules. It is widely used to improve communication, teamwork, and conflict management.

**Access / administration:** Some free versions. Paid assessments are comprehensive.

**Best use:** Team development, communication styles, leadership awareness

**Learn more:** <https://www.discprofile.com/what-is-disc>

### EQ-i 2.0 (Emotional Quotient Inventory)

*How someone manages emotions and relationships*

**What it measures:** EQ-i 2.0 assesses emotional intelligence across multiple areas, producing a total score and composite scores. It links emotional intelligence to workplace performance and leadership effectiveness.

**Access / administration:** Proprietary tool; typically delivered via consultants

**Best use:** Leadership development, executive coaching, interpersonal effectiveness

**Learn more:** <https://storefront.mhs.com/collections/eq-i-2-0>

### Big Five Personality Traits (Five-Factor Model / OCEAN)

*Who someone is, broadly speaking*

**What it measures:** A research-based model of personality that evaluates five broad traits: Openness, Conscientiousness, Extraversion, Agreeableness, and Neuroticism. It provides a comprehensive, scientifically grounded view of personality.

**Access / administration:** Many free versions available online. Also offered in validated, paid formats for professional use.

**Best use:** Broad personality insight, leadership potential, research-based evaluation

**Learn more:** <https://www.simplypsychology.org/big-five-personality.html>

### Predictive Index (PI Behavioral Assessment)

*How someone is likely to perform in a role*

**What it measures:** PI evaluates core workplace behavioral drives—Dominance, Extraversion, Patience, and Formality—to predict how individuals are likely to behave in a job and align with organizational needs. It is designed specifically for talent optimization and hiring decisions.

**Access / administration:** Commercial platform; requires subscription. Often implemented with HR teams or certified partners.

**Best use:** Hiring, role fit, team design, and workforce planning

**Learn more:** <https://www.predictiveindex.com>

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### **Succession Planning Bibliography and Further Reading**

Atwood, Christee Gabour (2020). *Succession Planning Basic (2<sup>nd</sup> ed.)*, Association for Talent Development

Written for small to mid-sized organizations, this book emphasizes clarity, simplicity, and immediate application. About 120 pages; includes templates and simple planning tools.

*Boatright, Judy L (2022). Leadership Development and Succession (2nd edition)*, Routledge

Aimed at employee-owned businesses, this book connects succession planning with development systems to build internal capacity over time rather than reacting to vacancies. About 90 pages; includes frameworks, case examples, limited tools.

Kelly, Mary C. and Powell, Merideth E (2020). *Who Comes Next? Leadership Succession Planning Made Easy*, Kaiman Publishing

Designed for managers and organizational leaders, this book breaks succession planning into clear, manageable steps with tools that can be applied quickly. About 170 pages; includes worksheets and practical exercises.

La Branche, Gary (2018). *The Association CEO Succession Toolkit*, ASAE

Written for association CEOs and volunteer boards, this guide is highly practical. It focuses on immediate readiness, emergency succession, and governance alignment. About 80 pages; includes templates and board-ready forms.

Timms, Michael (2021). *Succession Planning that Works*, Availle Management Consulting

Written for HR professionals, takes a step-by-step approach to implementing succession plans to deliver value, though less tailored to nonprofit governance contexts. About 230 pages; includes templates, worksheets, and ROI-focused tools.

Wolfe, Rebecca Luhn (1996). *Systematic Succession Planning: Building Leadership from Within*, Crisp Publications

Intended for HR professionals, this book offers a comprehensive, systems-based approach to developing internal talent pipelines. About 130 pages; supplemental materials and worksheets included through the book.

Wolfred, Tim (2009). *Managing Executive Transitions: A Guide for Nonprofits*, Compass Point Nonprofit Services

Aimed at nonprofit boards and executives, this book focuses specifically on executive transitions rather than full succession systems. About 150 pages; includes case examples and transition tools.