YOUR CSO IS LEAVING. NOW WHAT?

Your Chief Security Officer (CSO) may be retiring or leaving for one reason or another.

The transition can go smoothly—without exposing your organization to security threats—by remembering these two words: succession planning.

Organizations should have a succession plan in place for every C-level executive. There are many reasons why a CSO or another executive may leave a company either temporarily or permanently: retirement, new job, long-term illness, accident or termination. A well-designed plan can prevent last-minute scrambling and other operational issues.

Formulating a succession plan

A strong succession plan should answer these questions.

*Will the new or temporary CSO come from within, or will the organization search for an external candidate?*

The search process will be similar, but an in-house candidate will be easier to schedule for on-the-job training. An in-house employee will also have institutional knowledge of the company and its corporate culture. HR and other C-level executives will also have a better idea of how well that particular candidate would fit into the corporate culture.

*Who will be involved in the hiring and training of the new CSO? When should the search for a new CSO begin?*

Ideally, the search for a new CSO should start several months before the current CSO is leaving. A team should be organized to begin to start the search process. This team should consist of the following:

- The senior HR representative tasked with overseeing the selection process.
- If the CSO is leaving on good terms, he/she should be an integral part of the hiring.
- A C-level director or other senior executive who knows the corporate culture.
- The executive to whom the new CSO will report.
- An objective outside firm specializing in security should also be considered.

The team should first evaluate any in-house personnel to see who may qualify to be a temporary or permanent CSO. The results of that evaluation will determine whether the organization should consider outside candidates.

*What background and training should the new CSO have?*

Education is a key factor in hiring a new CSO; experience and leadership are just as critical. If possible, the new CSO should also have security experience in the same industry as the
company. Look for senior leadership and management courses at places such as Wharton, Kellogg School, FBI National Academy, the Harvard Kennedy School (international security program), and the ISMA Executive Leadership course at Georgetown University. Certifications such as the CPP designation from ASIS International, the CTM credential from the Association of Threat Assessment Professionals, or a CFE from the Association of Certified Fraud Examiners is a plus for any candidate.

These credentials, coupled with relevant experience, are often more important than a graduate degree.

**What sorts of background and reference checks should a company do on a potential hire?**

For any C-level executive, a full background check is essential. This person will have contact with the most senior echelons of the company, as well as access to sensitive documents such as HR records.

Conduct a criminal background in addition to searching for bankruptcies, financial issues, credit checks and prior litigation. Look for any type of employment the candidate has done in the past, including consulting and self-employment. Check civil history, employment lengths and previous addresses. Finally, look for all social media activities, blogs, personal websites, organizational involvement, controversial activities and interests. Verify all education, certifications and employment.

### Ensuring a smooth transition

Once a new replacement is selected, the following tips can help an organization make a seamless transition from an outgoing CSO to the new executive:

1. **Have an overlap between the existing CSO and the new one.** One month is good. Two months is better. Also, remember that you’re not trying to clone the current executive. The new CSO needs room to grow and succeed. He or she may have new ideas and ways to change things. Don’t stifle any enthusiasm during the overlap.

2. **Give the new CSO a mentor, typically a senior executive at the same level or one level higher.** This person can assist the new CSO in navigating the corporate culture. In addition, the mentor can help transition the CSO on various recurring meetings, budget requirements and what’s expected of him/her.

3. **Prepare a continuity reference guide for the new CSO.** If possible, the outgoing executive should document current practices and other important information to help his or her successor acclimate quickly.

4. **Educate the new CSO on the company’s business continuity plan and how it affects his/her department.** The new CSO could start on a Monday, and a catastrophe could occur on Tuesday. What is the security department’s role, and how do they function if the
office shuts down? Knowing security and emergency protocols early is critical for any security practitioner, regardless of their position.

5. **Know the staff.** The new CSO needs to come in and get to know all of his/her subordinates, including their strengths and weaknesses. A good leader should also be approachable.

Finally, remember that the next CSO may not be someone one level below the existing CSO, but a rising star two or three levels down. Don’t overlook a strong candidate because of his/her current job title.

To ensure the new CSO follows the right path, the hiring team should meet with the new CSO at one-, three- and six-month intervals to check in and address all questions, issues and concerns.

**Using outside assistance**

Often, organizations can benefit by partnering with an outside firm to bring on a new CSO.

First, an external partner can step in and provide a highly skilled, well-trained, experienced temporary CSO to give you time to find and hire the best permanent executive.

Second, a skilled security partner can help the HR department develop a strong, efficient succession plan, with input from the current CSO and senior management. With an objective, outside perspective, an external resource can also provide an assessment of the current security structure and strategies, and suggest changes and improvements that the new CSO should implement.

For additional information on how AT-RISK can assist your organization with CSO staffing and succession planning, please call us at 1-877-323-2444 or contact us at info@at-riskinternational.com.