

**Workshop Title:** Succession Planning in the Arts

**Target Audience:** Artists, Agents/Managers, Arts Administrators, Presenters

**Location:** Lab 2

**Panelist:** Marian Liebowitz (Manager- Marian Liebowitz Artist Management),  
Aaron Liebowitz (Manager- Marian Liebowitz Artist Management)

**Description:** Succession planning is an essential strategic process that ensures operational continuity during planned and unplanned leadership transitions. Succession planning can be a joyful long-term process of inducting new professionals into the arts who are then mentored and developed by seasoned leaders. These potential successors could be family members, students, mid-career professionals, or members of your volunteer staff who are ready for a larger commitment to your organization. Learn the key elements for a succession plan, how to build your team of potential successors, and how to set up your organization for ongoing success. We hope to inspire young and mid-career professionals to seek an opportunity as a successor, and to empower veterans in our industry to start grooming the next generation of leaders. This session is a guided round-table format led by Dr. Marian Liebowitz and her nephew, Aaron. Marian brought Aaron into the business over 4 years ago while he was still in college. Today Aaron is the Media and Operations Manager for the agency and on his way to being an agency partner. Marian and Aaron have a long-term multi-tiered succession plan that hopefully won't be needed for a very long time! We hope that professionals and volunteers, young and old, will attend. Attendees will be invited to identify gaps in their succession plans as well as to share their success stories.

## **Workshop Title:** Succession Planning in the Arts

### Topics to Cover

8:30am: Introduce Ourselves: Marian then Aaron

#### **Who needs succession planning?**

- **Paid employees**
- **Self employed people**
- **Volunteers**

Survey of Attendees: What stage are you at?

#### Mature Leaders:

- I'm enjoying myself too much to stop
- I think I could keep going if I could off-load some of the tasks
- I'm thinking of retiring/passing the torch
- I wanted to retire/leave LONG AGO but there's no one to take over.

#### Mid-Career:

- I'm enjoying myself and am content where I am.
- I'm overwhelmed and wonder if this is it?
- I think I could keep going if I could off-load some of the tasks
- I'm interested in upward mobility, therefore I need a mentor

#### Young in the field:

- I want to get ahead and don't know where to begin
- I have some ideas of a mentor, and don't know how to approach them
- I have found a mentor and would like more clarity about how to grow the relationship/role

Two types of mentee positions:

- Unpaid internship or volunteerism
- Paid position

#### **8:45**

**Marian:** Why Succession Planning is Important: We have a Succession plan to prevent a reactive, chaotic, and frantic response to succession.

- You want to ensure stability
- You want to reduce risks
- You want to maintain organizational/company culture
- You may be the only one who knows the organizational history
- THE SHOW MUST GO ON: Someone (Your successor) needs access to funds SO THAT if something happens, people still get paid

### **8:55: How we got started: Marian**

Marian: I needed help with technology and other tasks I did not enjoy, but Aaron did

- Website management
- Video skills
- Acting and Production skills; Experience with stage and production: Advancing meetings for our large shows

### **9:00 Aaron's story:**

**Aaron:** On the music side of my life, this came through a conversation with my aunt, who runs Marian Liebowitz Artist Management. At the time, I was unsure what exactly my role in the music industry could be, how connected I truly was to it and what outcomes I desired from it. Yet, I decided to throw myself into the inner workings of a talent agency and began to understand my appreciation and love for the industry through it. It turned out that I had a lot of transferable skills

Next: Aaron called Marian begging for more work so he could quit bagging groceries!

1. Aaron received a company email address.
2. Access and training in several areas: CRM, Annual rolling budgets, and marketing software
3. Checking budgets for unsigned contracts, late deposits

**9:10: Marian:** Over time: I realized that I could trust Aaron completely with delicate issues. I can share with him any aspect of the business and I trust his discretion.

### **Lately:**

1. Aaron is reviewing new CRM systems for a conversion, writing contracts, marketing
2. Aaron works directly with Artists on their EPKs and onboarding new artists to the roster
3. Aaron has input on artists we sign
4. Discovering Aaron had skills that allowed us to add services to what we offer our presenters and artists (press release templates and execution)

### **9:15: Marian: More about Creating Joy: How to free yourself up to do the things you love**

**TIP #1:** OFF-LOAD what you don't enjoy or could be better done by someone else. Planning is to ensure long-term and proactive change. (The Love to, Like to, Willing to, Hate to list)

**TIP #1A:** Where to look for mentees:

- Volunteerism course I taught, what it taught me
- Students who need internship credit
- Rejoining the workforce (mothers whose kids are now out of the house; retirees, Family members)

### **TIP #2:**

Discover what your mentee loves to do? (Aaron studied film-making, acting, and production which has been invaluable to our artists and agency)

**Aaron:**

**TIP #3:** Aaron: Data Management (CRM) HOW to find the right CRM for your needs, how to grow your data

- Ensure staff know how data is managed and where to find important information/documents needed for their job and others.
- A good practice is to have a procedures book or documents that outline regular or seasonal constants for the organization.

**Marian:**

**TIP #4:** Financial Transparency and Understanding

- Banking
- The Grid: Meticulous recording of financial information
- Tax prep during the year

**TIP #5:** Succession Transparency and Mentorship

- Trust; how to create a trusting relationship: Aaron & Marian
- Provide a written job description (and pay scale if applicable) that everyone signs
- **Keep Teaching, keep asking: Conference Behavior:** First APAP he attended in person was January 2023. I observed Aaron's skill set for engaging people both in and out of our exhibit. (He had been a server and talked to everyone). It was at this point I started to see Aaron's personality as a true asset in the business.

**Aaron:**

**Communication Strategies for Employees and Stakeholders**

- If you want to be a successor, let that person know
- If you need a successor and you see some viable options, speak up
- HR issues and confidentiality

**Marian:**

**How to be a good mentor:**

- **Communicate clearly what you need**
- **Watch for impatience**
- **Allow appropriate time for the task to be completed**

**Aaron:**

**How to be a good mentee:**

- **Communicate clearly what you don't understand**
- **You are going to do things differently than your mentor. They may be critical. Learn to handle appropriate criticism.**
  
- **Be timely and on time.**

**9:30 Group conversation:**

Question or a tip they have