MASTERCLASS

STEWARDSHIP, SUCCESSION & SCALABLE LEADERSHIP



BUILDING BEYOND YOUPOST CONFERENCE MASTERCLASS



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CONTENTS



OPENING REFLECTION

BECTION

SPIRITUAL FOUNDATIONS
PRAYER, STILLNESS, FAITH, VISION

SECTION

INSTINCTS & TIMING

SECTION D

STRATEGIC FRAMEWORKS & TOOLS



30-DAY ROADMAP & COMMITMENTS



6-MONTH VISION & TESTIMONIAL FRAME

DATE: 2nd October 2025



NAME	
	-
	_
NAME OF ORGANIZATION	



OPENING REFLECTIONS

My current leadership season Type your thoughts here — 3-6 sentences My fears & hopes around succession Type Fears: Type Hopes:



SPIRITUAL FOUNDATIONS

(Prayer, Stillness, Faith, Vision)

Spiritual Foundations (Prayer, Stillness, Faith, Vision)

PRAYER		

Spiritual Foundations (Prayer, Stillness, Faith, Vision)

STILLNESS

Define what stillness means to you
FAITH
How do you avoid double-mindedness?
VISION
Your vision for stewardship and succession

Reflection

iich of Stillr	ness / Faith ,	/ Vision is	most cha	lienging for	you, and w

Prayer prompt:
Write a short prayer asking God to reveal clarity for your next steps.



INSTINCTS & TIMING

Instincts & Timing

How I knew / sense it may be time: Type internal indicators or patterns e.g., restlessness, bottlenecks, readiness of others

Step-Away Goal

(Target date)://

TOP 3 INDICATORS I WILL WATCH

INDICATOR 1		
INDICATOR 2		
INDICATOD 2		
INDICATOR 3		
,		



STRATEGIC FRAMEWORKS & TOOLS

Personal Governance

What does it cost to be me (time, energy, reputation, finances)

Personal Governance

Post-payroll income plan (where will steady income come from

Personal Governance My Personal Board / Advisors (names or roles):

Personal Governance

Support systems I need (mentors, therapists, financial planner, accountant):

Leadership Pipeline Potential successors (name / role):

Leadership Pipeline Assessment criteria (key traits/behaviours you want):

Leadership Pipeline Roles / responsibilities I can assign to develop them:

Organizational Governance Current governance structures (board, committee, policies):

Organizational Governance Policies/processes missing or weak

(decision flow, conflict of interest, reporting):

Organizational Governance

One policy/process I will draft or update in next 30 days:

Continuity Tools (Playbook & Compass)

One critical process that lives only in my head (must document):

Continuity Tools (Playbook & Compass)

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Continuity Tools (Playbook & Compass) Proposed review system (frequency & method

e.g., quarterly check-ins:

o.g., quarterly erreak me.

Succession Readiness Checklist (tick those you already have):

	Roles documented
	Successors identified
	Governance policies in place
	Personal financial continuity planned
	Processes documented
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30-DAY ROADMAP & COMMITMENTS

Fill each row now — be specific and realistic.

Туре	Action	Who I Must Engage (Name/role)	Resources Needed	Success Indicator (How measured)
Personal Governance				
Pipeline / Leadership				
Organizational Governance				
Continuity / Documentation				

Accountability	_		

Check-in rhythm (weekly / biweekly / monthly):



6-MONTH VISION & TESTIMONIAL FRAME

In 6 months I want to be able to say:

Statement	1 — e.g., "I documented my leadership playbook.
01	
Stateme	ent 2 — e.g., "I have 2 successors in active development.
02	
Statement 3 —	e.g., "My income streams outside payroll are generatin
07	
03	



ORGANIZATIONAL TRANSFORMATION STATEMENT





THANK YOU

I-INVEST MASTERCLASS WORKBOOK