

Planning Today for Results Tomorrow

accesscss

Succession Planning



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Success Equation

**Better
Awareness**



**Better
Choices**



Better Results

Workplace Team Engagement

15%

Actively Disengaged

60%

Disengaged

25%

Actively Engaged

Conversation Goals

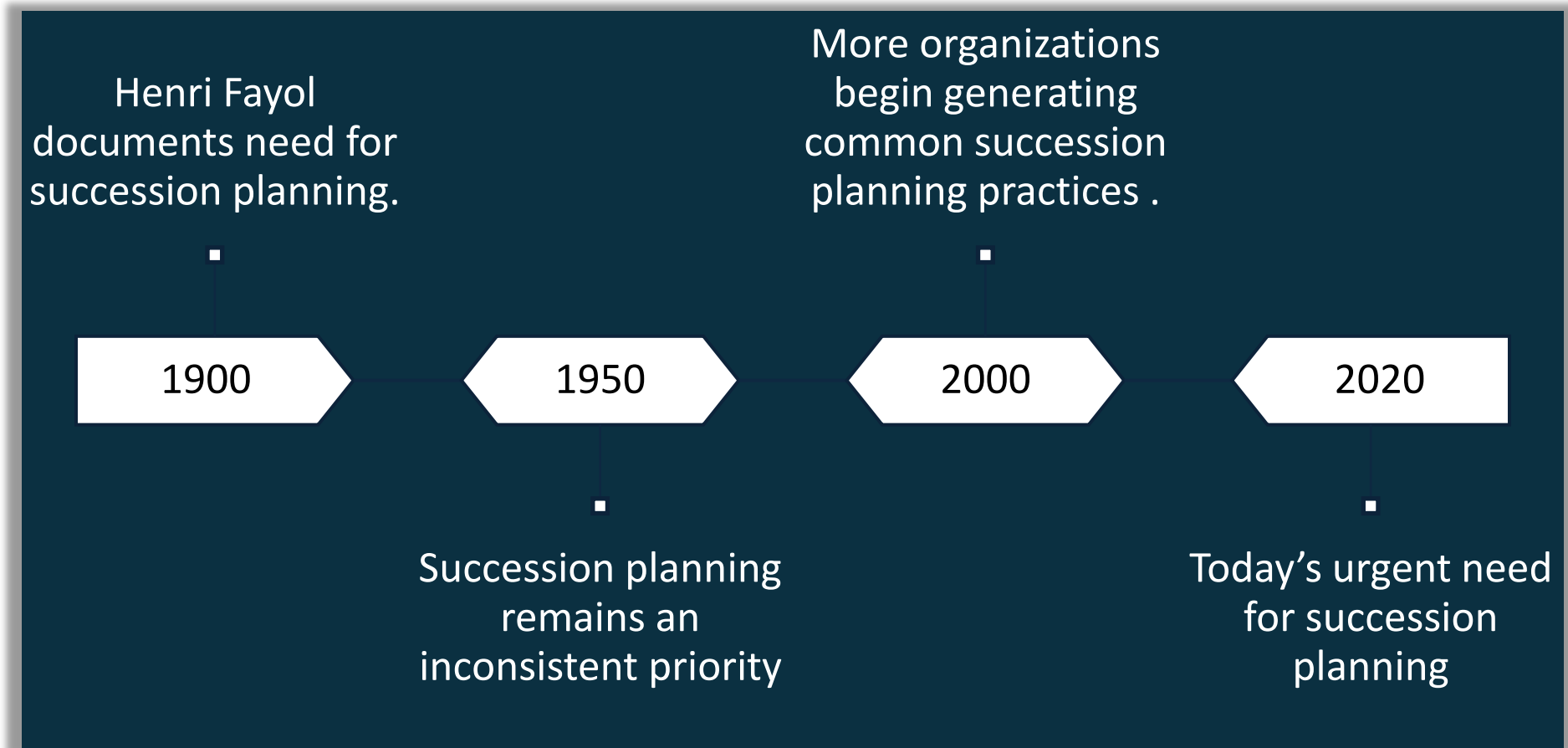
1. Defining succession planning for our environments
2. Addressing succession planning challenges benefits
3. Creating a succession planning framework
4. Implementing your plan using success factors



Your Conversation Goals



The Succession Planning Journey





What does
succession
planning
mean to
you?

Succession Planning

A strategy for identifying and developing future leaders - not just at the top but at all levels. It helps your organization prepare for all contingencies by preparing high-potential workers for advancement.



Reflect: How comfortable are you with your succession planning process?



- a) Very comfortable
- b) Comfortable
- c) Somewhat comfortable
- d) Not comfortable

Assessing Our Current State

1. Attracting and Recruiting Talent
2. Training and Development
3. Performance Management
4. Talent Management



Defining Your Plan:



Where you are



Where you want to be



Preparing for Challenges

*Identify the challenges or barriers you face
when it comes to succession planning*



Succession Planning Benefits

Benefits to Succession Planning



Mitigates risk.



Helps to maintain trust.



Fosters clear team communication and expectations.



Allows time to prepare.



Frees up time to focus on goals.



Creating a Framework



#1

Observe &
Reflect



#2

Build a
Process



#3

Find the
Right
People



#4

Write the
Plan



#5

Sell the
Plan

#1

Observe and Reflect

- What are you noticing?
- What is working?
- What is not working?
- What would make things better?
- Who could you talk with?
- What are other organizations doing?



#2

Build a Process

- Decide how you'd like it to look.

Consider:

- Why
- What
- Who
- When
- Where
- How

<https://www.shrm.org/topics-tools/tools/toolkits/engaging-succession-planning>



#3

Find the Right People

- Know what you are looking for
- Be able to communicate what you are looking for (and why)
- Observe
- Ask

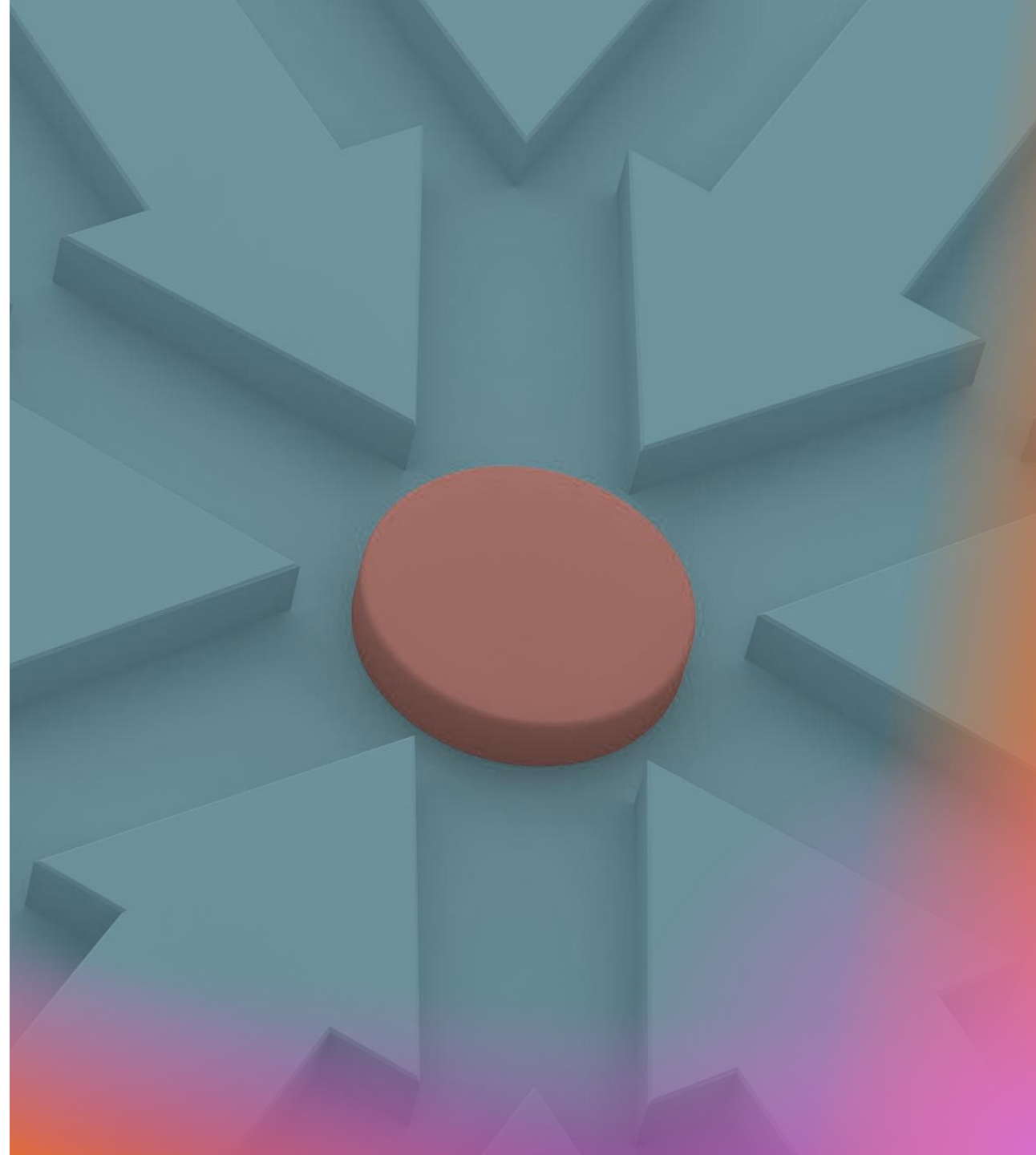


Leadership Criteria

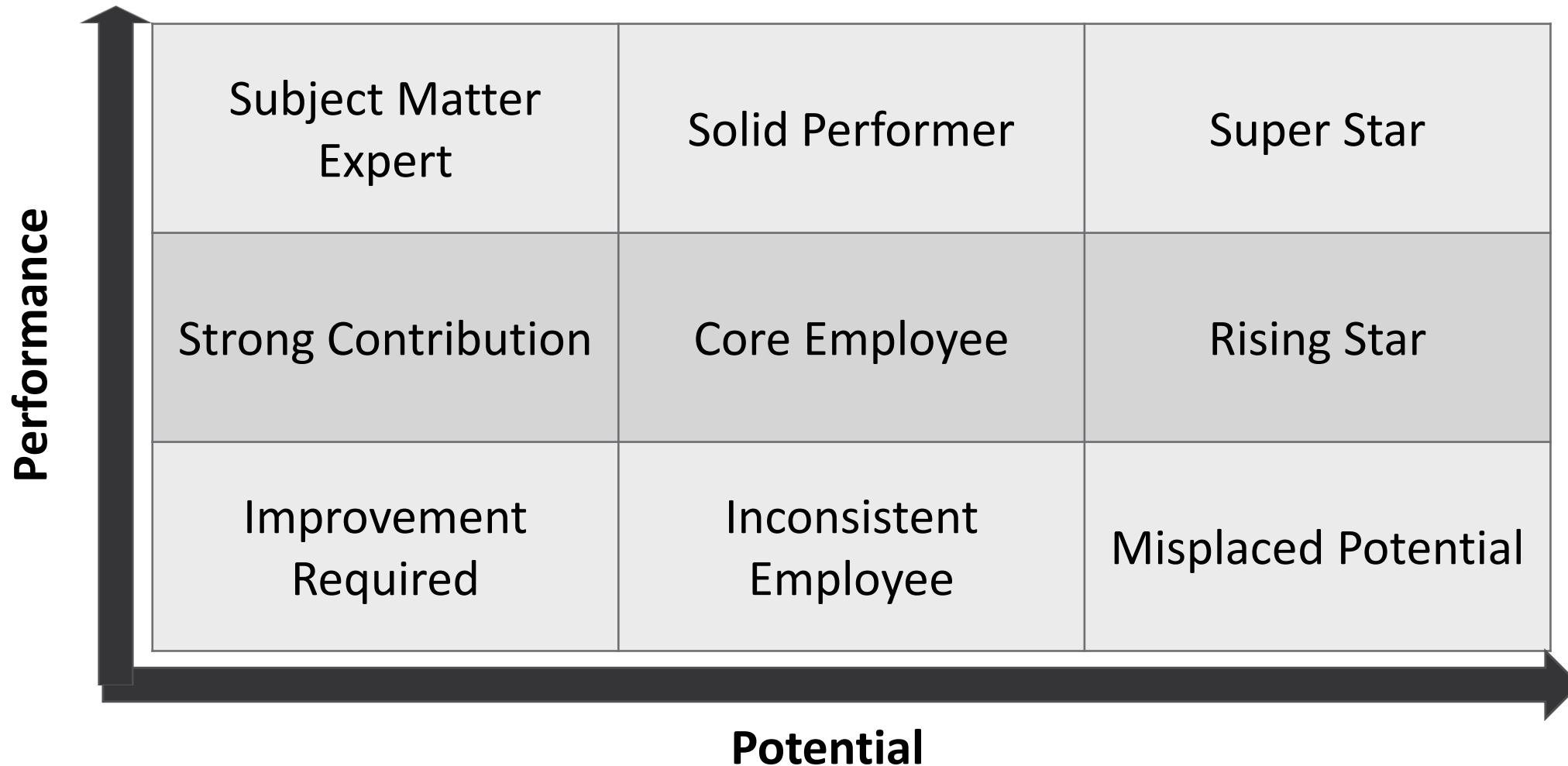
How do you want to define a leader within your organization?



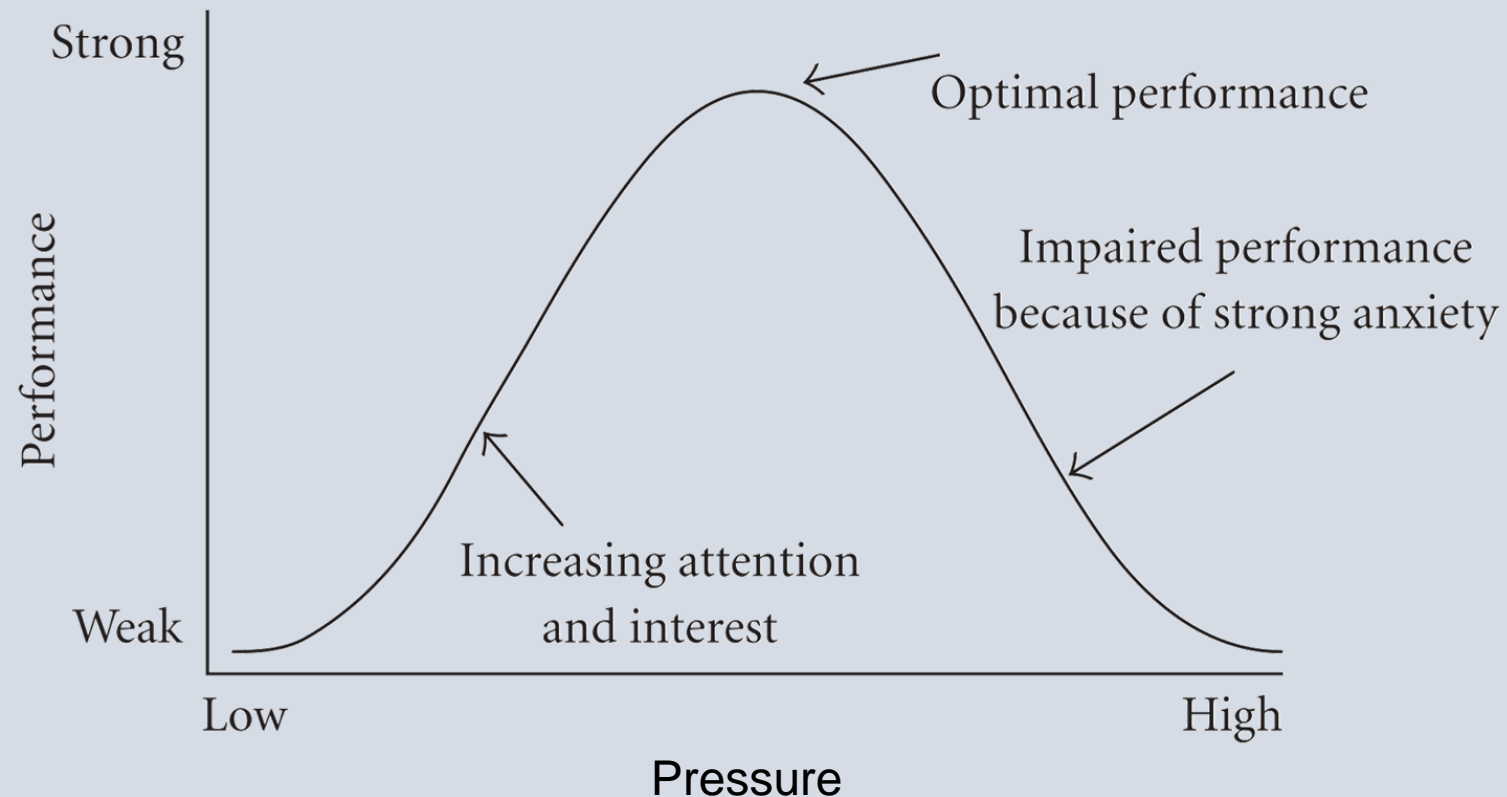
A person who demonstrates influence and acts as a guide, leading their team on their journey to success.



Performance Potential



Performance – Pressure Curve



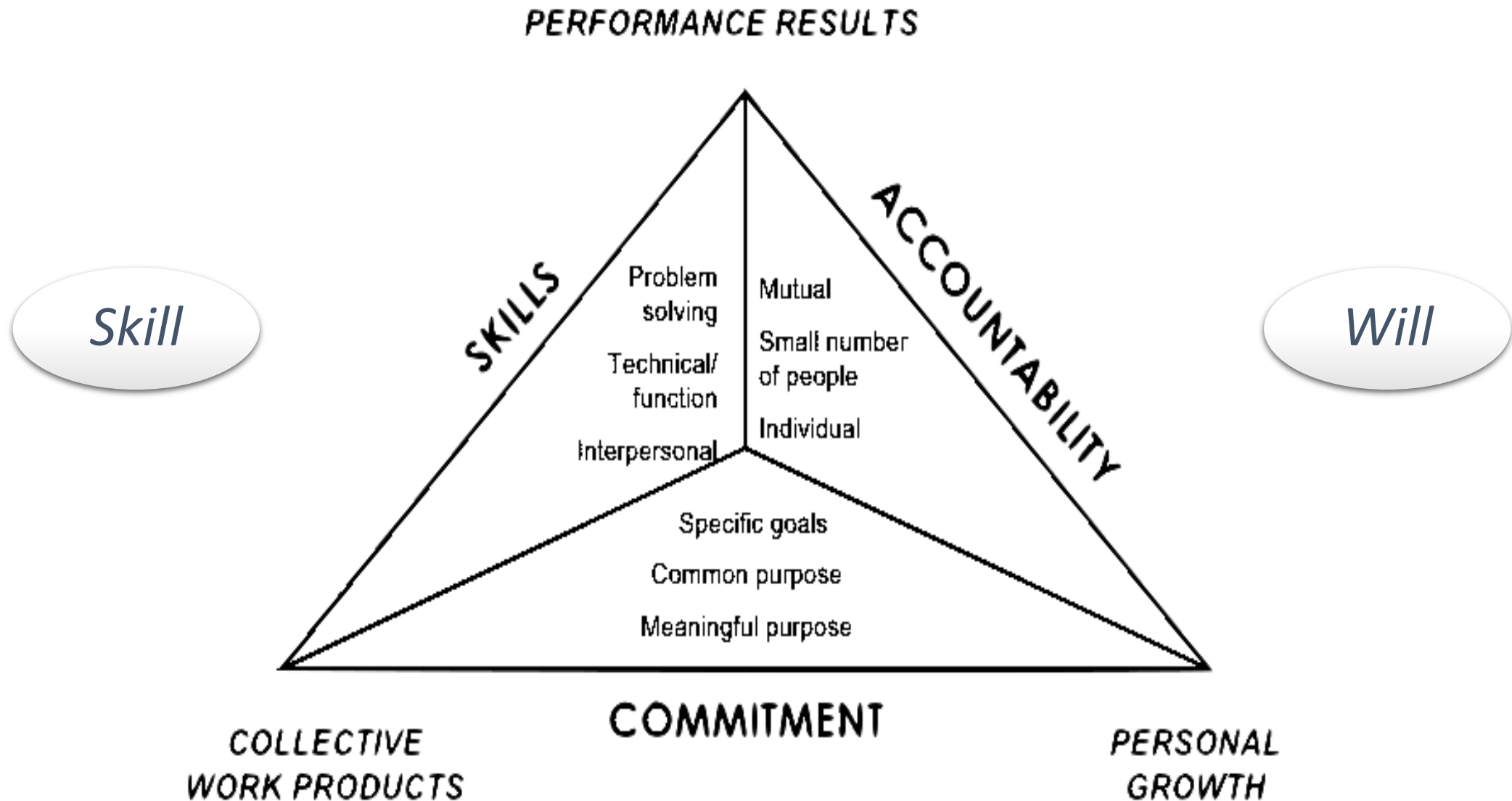
#4

Write the Plan

- **Consider** what is best for all aspects of the organization: the team, the clients, your growth strategy, and the employee.



Succession Planning Mindset Mindset



#5

Sell the Plan

- **Acknowledge:** the situation
- **Ask:** how they are feeling about next steps
- **Address:**
 - I recommend
 - Because this will (benefit)
 - Here how we'd start
 - How does that sound?



Obtaining Buy-In

- ☐ Gain credibility
- ☐ Observe & Ask
- ☐ Communicate
 - ☐ The benefits
 - ☐ “The why”
- ☐ Effectively listen
- ☐ Speak to the benefits





Defining Success Factors

- Make learning a part of your culture.
- Communicate with everyone involved in the plan
- Develop reliable data
- Have senior level support
- Continually assess your results

Tip: You do not have to do it all at once.

Professional Development Plans

1. Relationships
2. Experiences
3. Training



Communicating the Plan: A Conversation Template

Greeting	
Purpose and goal	
Ask for help	
Explain WHY	
Provide WIIFM	
Set expectations	
Provide resources	
Give confidence	

Name:		Position:	
Review Date:		Supervisor:	
Overall Rating:		Review Period:	Six Month Annual Review
Rated By:			
Result Indicators	Performance During Current Period		
On track	Met and sometimes exceeded goals established		
Above track	Consistently exceeded goals established		
Below track	Met some but not all goals established		
Leadership Indicators	Performance During Current Period		
Leads	<ul style="list-style-type: none"> ○ Often the first to volunteer; sets an example that others emulate ○ Takes initiative consistently ○ Makes suggestions for improvements or change with reliable backup ○ Rating in the above track area 		
Follows	<ul style="list-style-type: none"> ○ Demonstrates preference to be a part of the working team ○ Takes initiative occasionally, but not consistently ○ Accepts leadership from others 		

Add to succession plan for profile development?	Yes	No	Not yet
Justification:			
Signature:			
Date:			

Succession Planning:

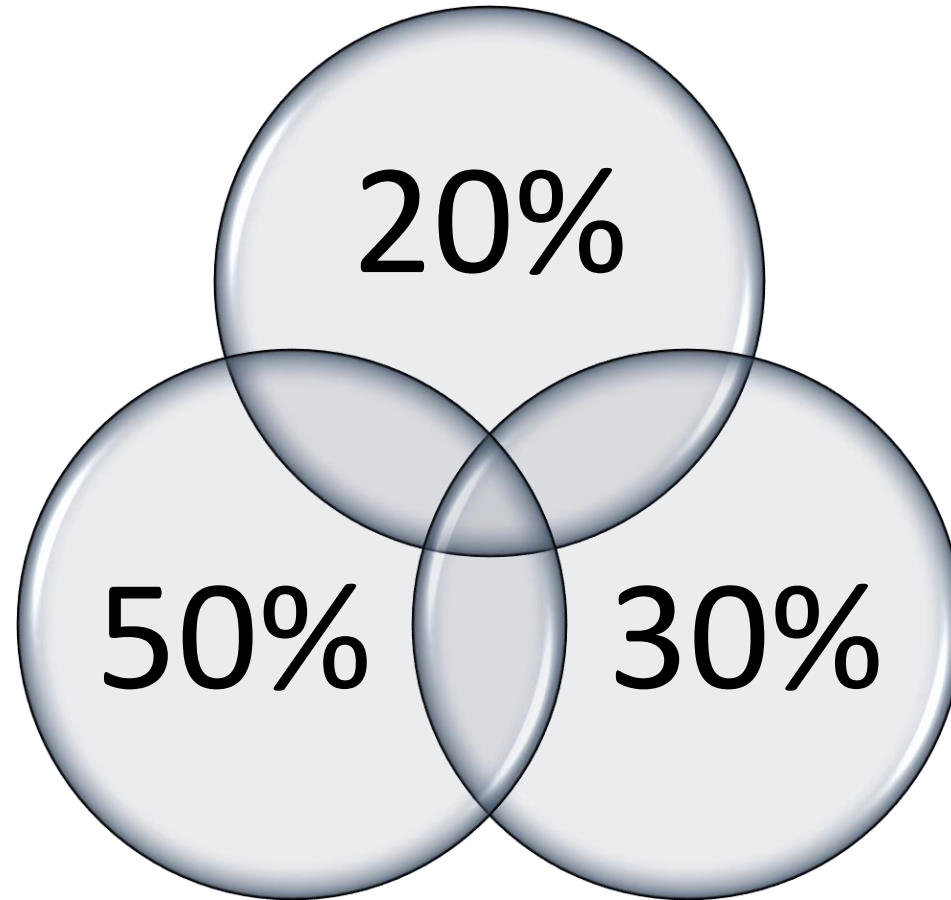
Creating A Quick Reference,

Implementing the Plan

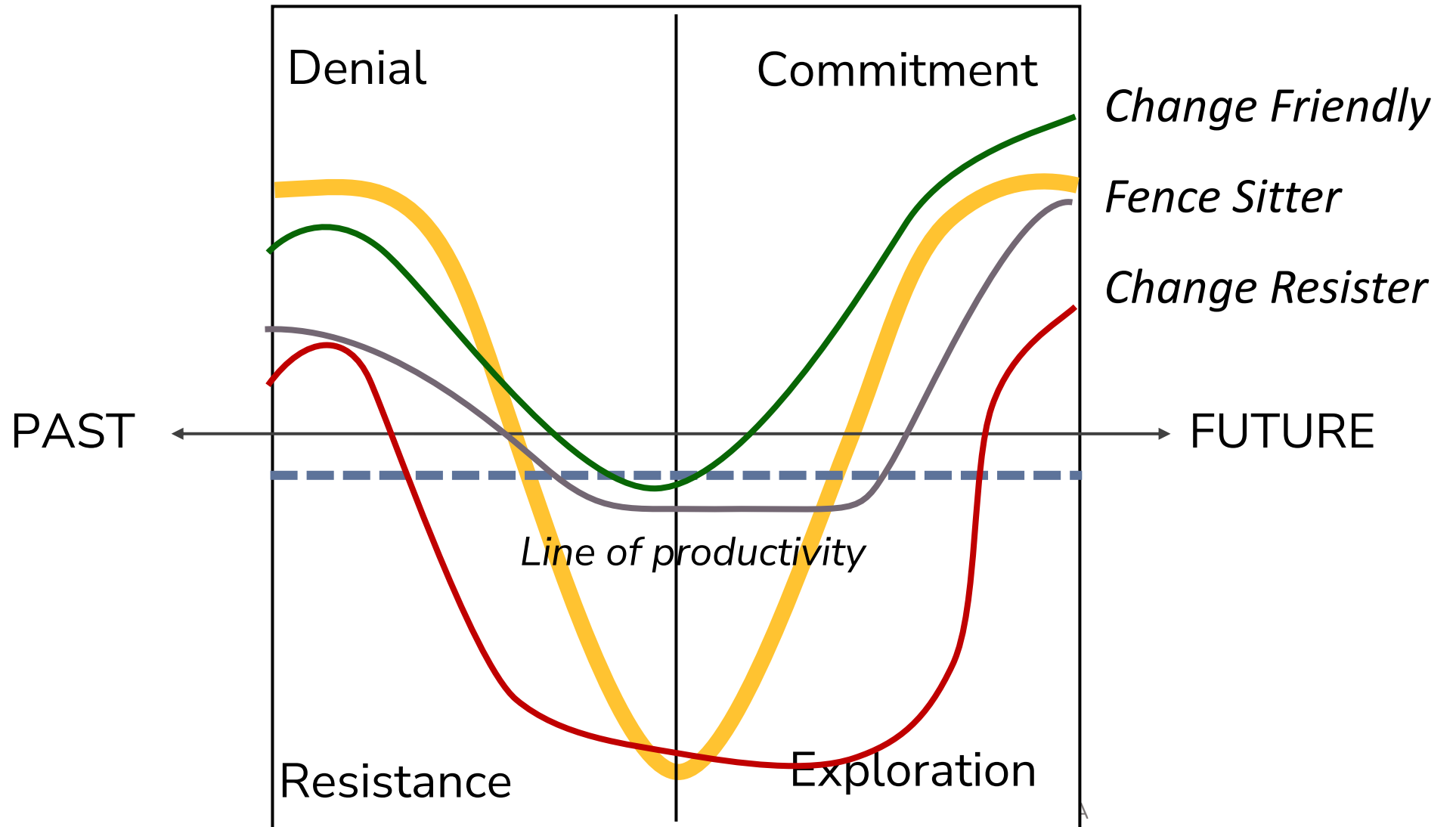


- ☐ Identify key positions and their value.
- ☐ Document the details of the job.
- ☐ Maintain an active succession plan.
- ☐ Assess the hiring process:
 - Is the position easily filled? Internally or externally?
- ☐ Create a process for transferring knowledge.

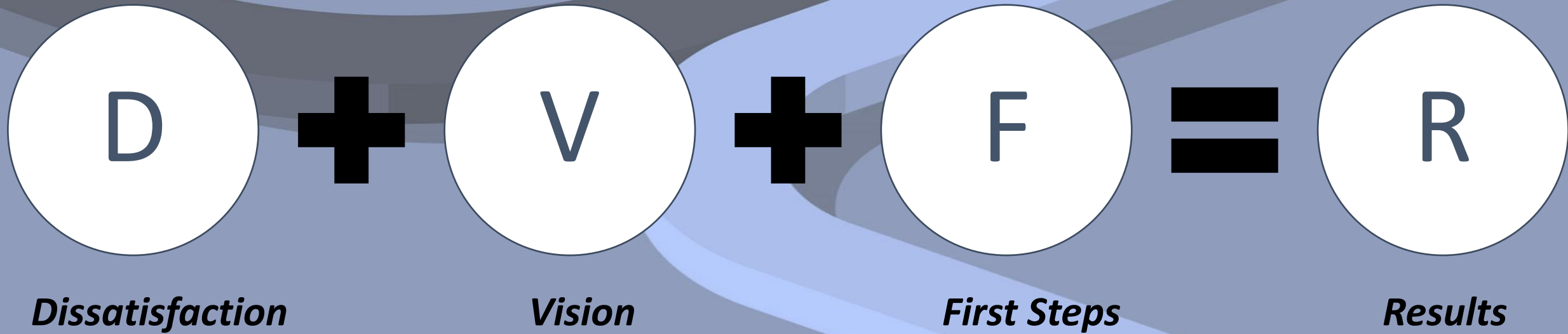
Change



Overcoming Resistance



Leading with Courage to Change



Establishing Goals

Specific

Measurable

Ambitious

Relevant

Time

Clarity

Challenge

Commitment

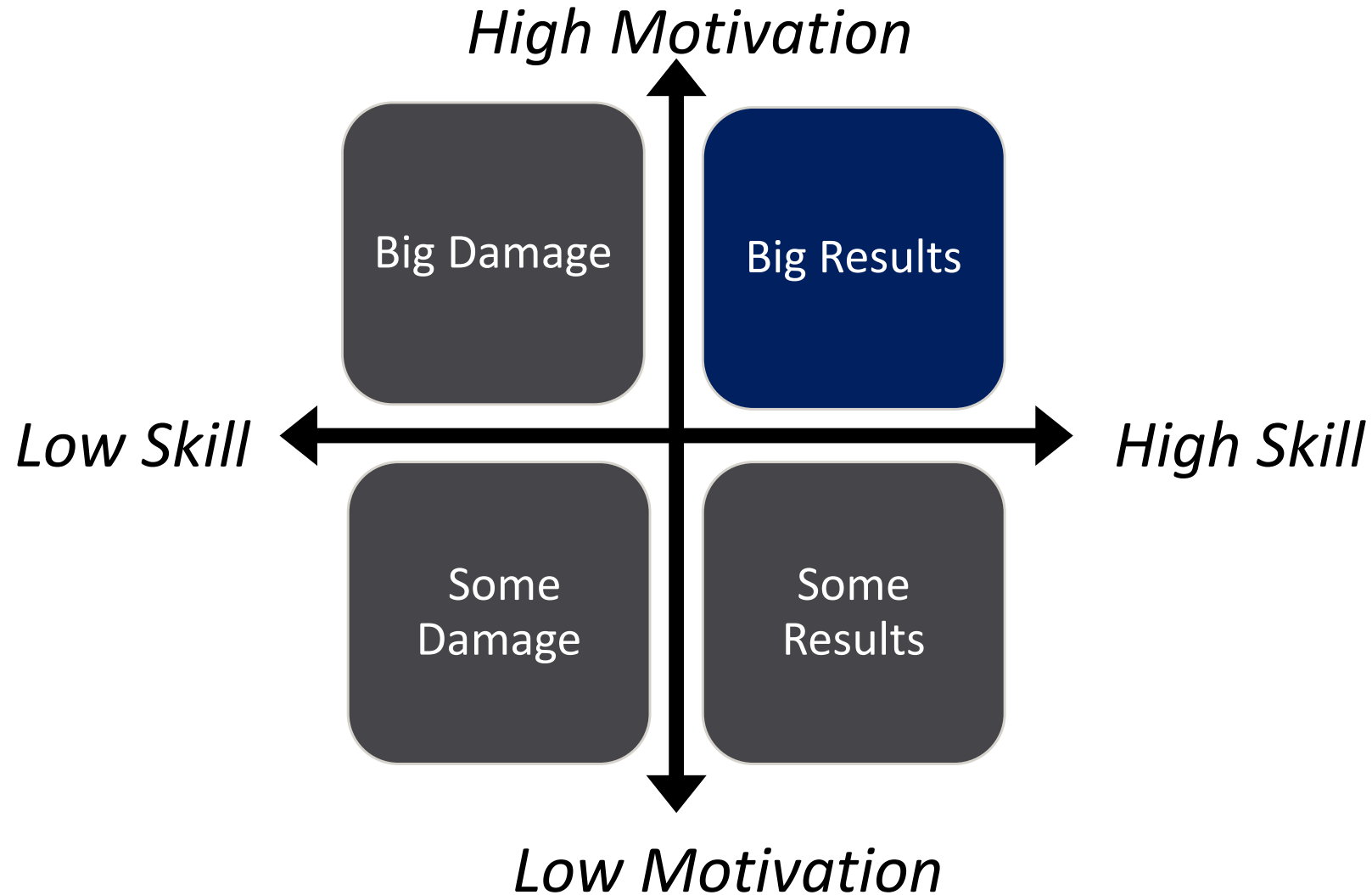
Feedback

Maintaining Engagement

The pessimist sees difficulty in every opportunity.
The optimist sees the opportunity in every difficulty.

- Winston Churchill

The Motivation Matrix



Motivation Criteria

1. Do you expect to **reach** your goal?

2. Is your pursuit **valuable**?

3. Can you avoid impulses and avoid **distractions**

4. Can you **start** immediately?

Understanding Motivators

Challenge

Compensation

Security

Recognition /
Affirmation

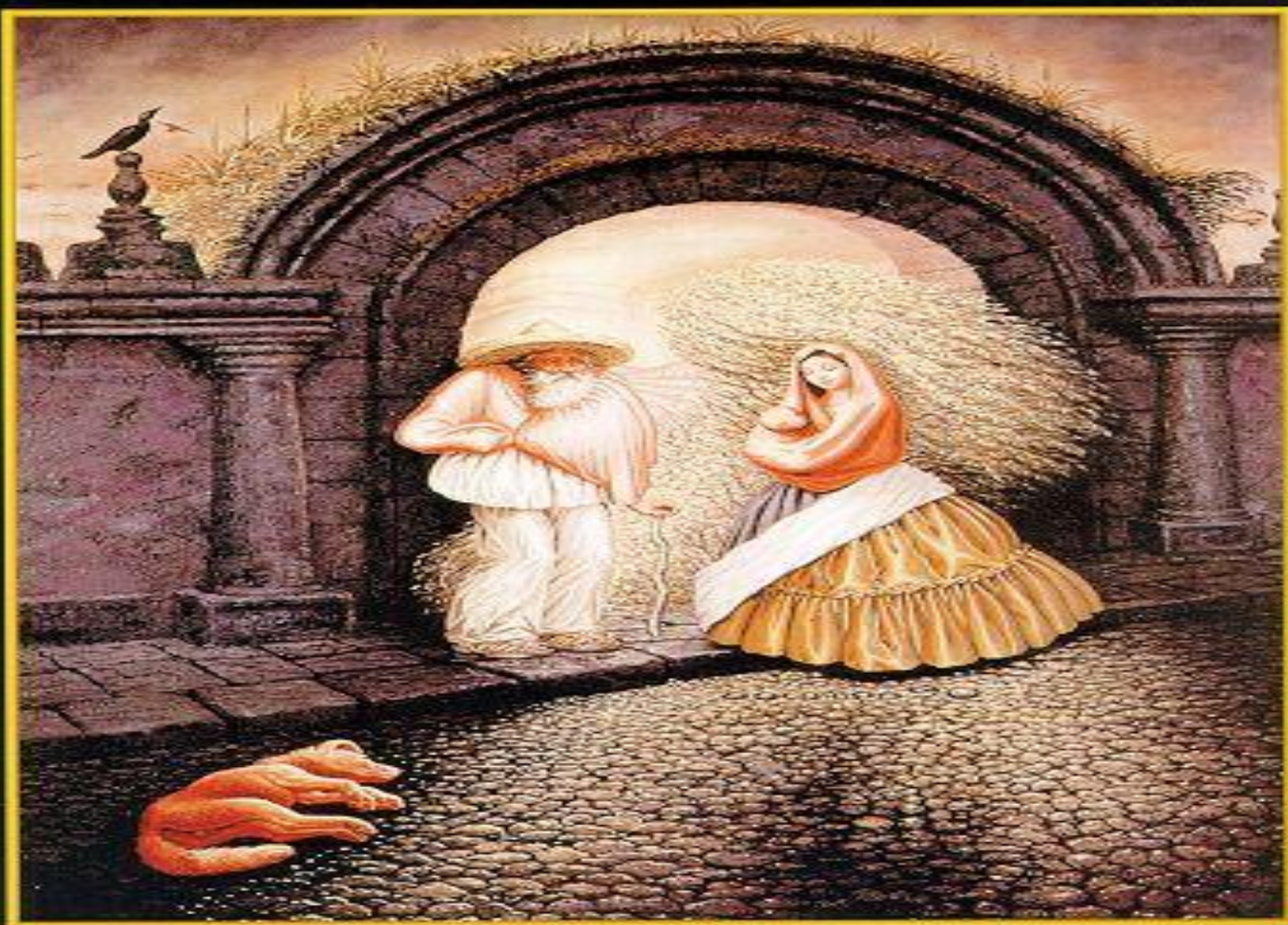
Purpose and
meaning

Intrinsic motivation is defined as the doing of an activity for its inherent satisfaction rather than for some separable consequence

- Autonomy
- Purpose
- Mastery

Review and Reflect







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