

Succession Planning

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Where Do We Start?

Everyone leaves eventually....

- Goodbye!
- Au revoir!
- Hasta la vista baby!
- Auf wiedersehen!
- Arrivederci!
- Sayonara!

Planned or unplanned?

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What is Succession Planning?

- A deliberate & systematic way to ensure roles are filled
- A process to develop talent internally
- Helps with retention
- Key to continuity of service to the community

It is a kind of risk management!

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Where to start?

Approach 1 – Demographic Review (Person focus)

- Age
- Overall service
- Service in current position
- Who do you think will stay or leave in the next 12-18 months? A guess is better than nothing!

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Another way to look at it:

Approach 2 – Rank all positions (Position focus)

- Rank by specialization (skills, education, experience)
 - Higher specialized = less redundancy = more negative impact

Then...

- Rank by availability in market
 - Less available = more negative impact

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Ranking Specialization

- 5: Unique skills/knowledge; pivotal person
- 4: Important resource: specific skills/knowledge
- 3: Important resource, several in role
- 2: General competencies in own area
- 1: No specific competencies

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Now you have decisions to make

Build your talent
Or
Buy it: recruit, cherry pick

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We focus on “build” first!

List role each person could potentially move into:

- How soon?
- What experiences, training, exposure do they need?
- Cross training of key elements – vacation coverage
- Can the job be changed?
- What do they want?
- Goals on Performance Appraisal plans?
- Training from OGRA?

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We've don't have a match!

Can the work be re-organized/re-distributed?
Is outsourcing/technology an answer?
Do you have: SOP's, process charts, flow charts?
You have to buy aka recruit or cherry pick!

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The rubber meets the road!

List every highly specialized or low availability role
Figure out immediate redundancy
Not to be morbid...what if something happened today?
Plans bring peace of mind and open up options

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“Man Plans and God Laughs”

(Translation of Yiddish saying)

Succession plans are not static

- People’s circumstances change
- Priorities can change
- Budgets can change
- Technology changes
- ...without a plan, you have chaos!

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Interested in more information?

Questions?

Email me and you will receive useful talent management charts, material and planning templates!

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