



# Succession Planning

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## Workshop Objectives

1. Understand the value and urgency of creating and implementing succession planning in today's business environment
2. Examine sample succession plans, models and other tools that clarify the process
3. Apply a 7-step process for succession planning that encourages diversity in the workforce.
4. Communicate your planning process so that others are engaged rather than defensive about or disinterested in the process

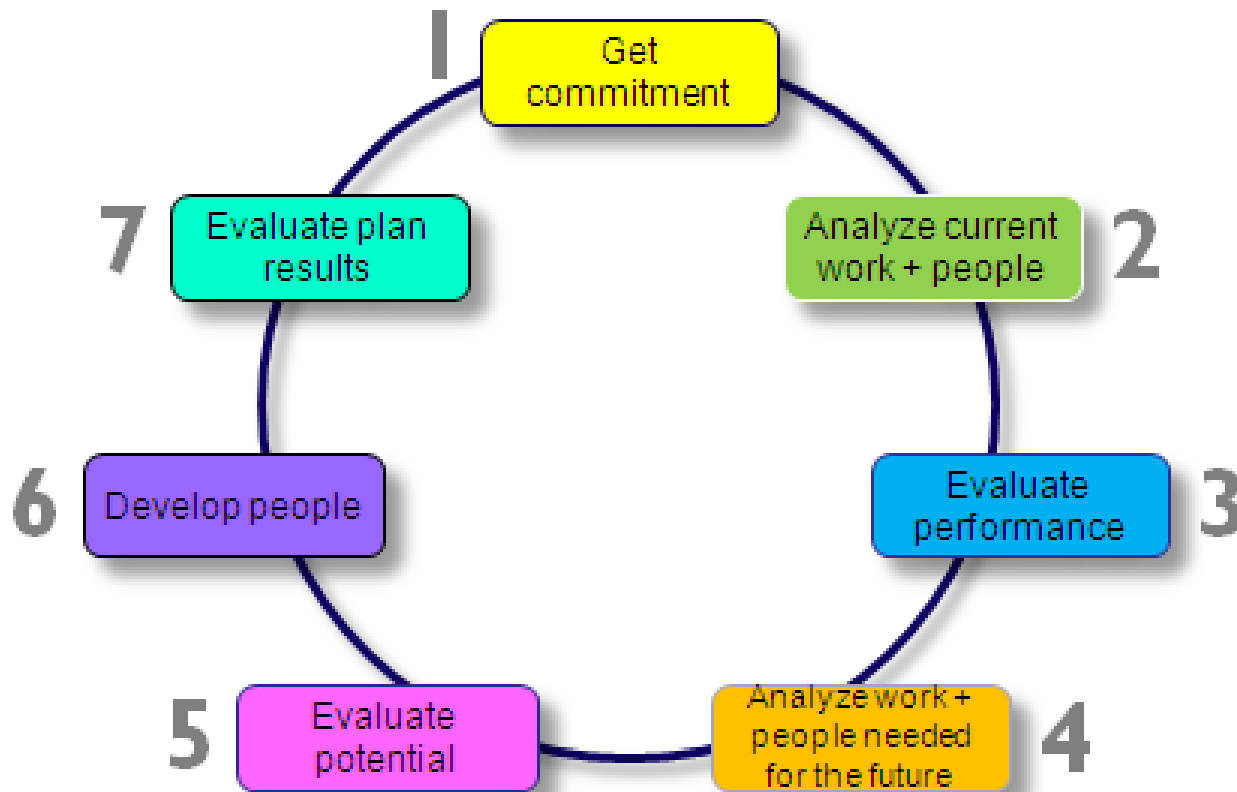
## Definition

- 1.
- 2.
- 3.

## What Succession Planning is not....

- \*
- \*
- \*
- \*
- \*

# Succession Planning Model



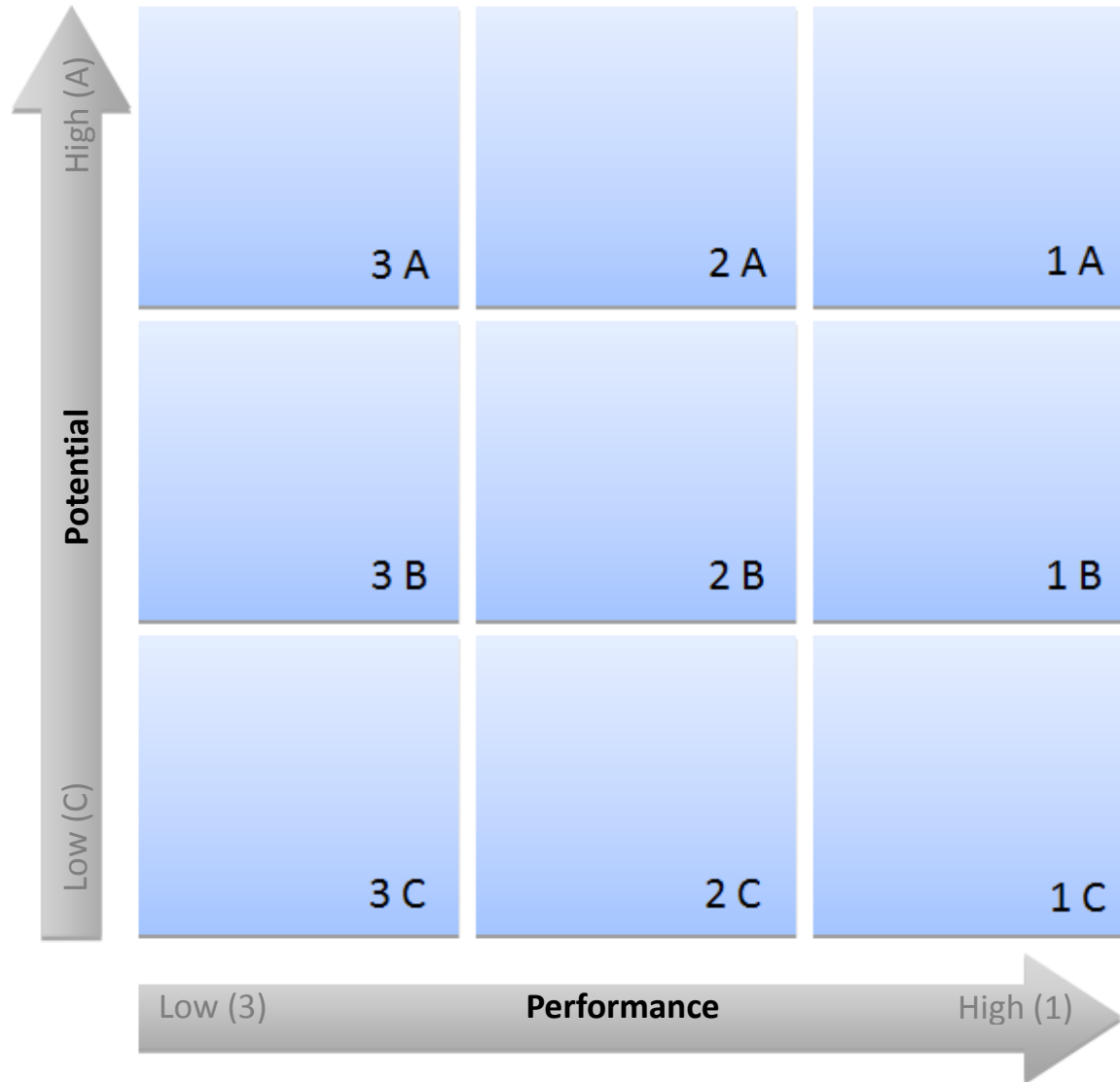
Source: William Rothwell, *Effective Succession Planning*, 2005

# Plan Components Checklist

- Skills / experiences needed to do the job now, and two years from now
- Strength of current candidate pool
- Reasons employees might not be available for this role
- Number of people who could be job-ready now
- Number of people who could be job-ready in the future
- Performance and potential assessment of current candidates
- Development opportunities to be made available to ensure readiness
- Gaps in plan (areas where it is likely external recruitment will be needed)



## Succession Planning - The Nine Box Grid



In the blank space below, list people for consideration and their current roles. Next, begin to place individuals in the nine box grid based on your assessment of performance in current role, and potential for advancement.

Current Talent Pool			
Name	Strengths	Needs: Skills, Experience, Development	When Job-Ready?
From My Department			
From Other Departments/Locations			
External Candidates			

Future Talent Pool			
Name	Strengths	Needs: Skills, Experience, Development	Time Frame
From My Department			
From Other Departments/Locations			
External Candidates			

## Planning Dos and Don'ts

### Dos

- Develop a strategy and stick to it
- Write it!
- Don't wait
- Complete it as a team
- Communicate its purpose and link it to your vision
- Think of "talent alternatives" not "entitlement promotions"
- Consider talent across departments, functional lines and geographic boundaries



### Don'ts

- Think that you won't need one
- Assume individuals will buy into your development plans for them
- Offer future position guarantees or create attitudes of "entitlement"
- Focus on "high-potentials" only
- Focus on "recruiting externally"
- Communicate to leaders and employees ONCE and expect all to remember
- Rank leaders against each other





Notes: