Leadership Development and Succession Planning

Developing your Strategy

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Presented By:

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“We put good people in big jobs before they are ready”.

Pepsi Co
What is succession planning?

- Systematic process for identifying, assessing and developing staff
- Vital to future success of an organization
- Strategic Planning for Human Capital
- Investment in your future leaders
- Succession Planning is proactive and not reactive
- Sustainability that creates motivated and capable employees
Key Issues:

- Support and backing of Senior Management
- Part of integrated HR process
- Identify skills needed by the organization
- Critical positions must be identified and included in the planning
- Identify high performers
- Identify soon to be retirees
- Identify skills, responsibilities and competencies
- Establish a system of communication
Leadership Development = V+C+L

Variety of Experiences + Challenging Assignments + Ability & Willingness to Learn

Center for Creative Leadership
Succession Planning: Key Elements

- Assessment of Key Positions
- Identification of Key Talent
- Development Monitoring & Review
- Assessment of Key Talent
- Generation of Development Plans
Succession Planning: Key Elements

- Assessment of Key Positions
- Identification of Key Talent
- Assessment of Key Talent
- Generation of Development Plans
- Development of Monitoring & Review
SUCCESSION CANDIDATES

KEY POSITION TITLE __________________________

Backup Candidate Name: ______________________

Current Title: ________________________________

Div: ___________ Level of Readiness (Circle One):

Within 1 Yr.  1–3 Yrs.  3–5 Yrs.

__________________________________________________

Strengths for this position:

Developmental needs for this position:

Comments:

__________________________________________________

Date: ___________________  FY: ___________

Completed by: ___________ Division: ___________
## SUCCESSION PLAN SUMMARY

**ORGANIZATION:**

<table>
<thead>
<tr>
<th>Key Position Title</th>
<th>Incumbent Name</th>
<th>Position Vulnerability</th>
<th>Succession Candidate Names</th>
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<td>Open in &lt; 1 Yr</td>
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| **Overall Performance Summary:** |
| (Indicate recent performance including major accomplishments or performance issues.) |

| **Key Strengths:** |
| (List 2 - 3. Indicate key technical or professional competencies, skills, or knowledge the person has.) |

| **Development Needs:** |
| (List 2 or 3. Indicate key experiences, skills, or knowledge the person lacks in order to move to the next level.) |

| **Development Actions:** |
| **1. On The Job:** (What new responsibilities do you plan to assign to help this person develop this year?) |

| **2. Special Assignment:** (What task force, projects, or special assignments will be given this year to aid development?) |

| **3. Training:** (What specific training or seminars are recommended this year for his/her development?) |

| **Potential For Promotion:** |
| (Indicate this persons readiness to be promoted to the next organizational level.) |

- Ready now for the next level.
- Ready in the next 24 months.
- Ready in 2 to 3 years.

| **Recommended Next Position:** |
| (List the next assignment that would most benefit the individual in his/her development.) |
Development Toolbox

**Highest Return…**

- Full Job Change Focused On Development Needs
  - Job Restructuring Based On Development Needs
  - Mini Assignments
    - Cross Divisional Project Leadership Or Assignment
    - Focused Coaching & Counseling
    - Industry Representation
  - Industry Representation
  - Visits Accompanying Senior Executives
    - Formalized Education Programs
      - Full 360 Degree Feedback and Evaluation
      - Motivated Self Development
    - Seminars and Conferences

… Lowest Return
Toolbox for Succession Development

On the Job:
- Job Enrichment
- Special Projects
- Committee Assignments
- Task Force Participation
- Giving Presentations
- Leading a New Project
- Temporary Job Assignments
- Full Job Change
Toolbox for Succession Development

Learning From Others:
- Working with a Mentor
- Teaming with an Expert
- 360 Feedback
- Focused Interviews

Training & Education
- Seminars and Conferences
- Continuing Education
- Cross Training
Semi-Annual Succession Planning Review

- Review of succession candidates and development plans in each organizational unit/area

- Report development progress and make necessary adjustments to the plan

- Orchestrate moves for the next 6 months
Pitfalls of Succession Planning

- Underestimating or overlooking employees
- Not considering lateral moves
- Not offering training and development opportunities
- Not tailoring a developmental plan specifically to the position
- Not holding managers and leaders accountable
- Not sharing the data with employees
"The domain of leaders is the future. The leader's unique legacy is the creation of valued institutions that survive over time. The most significant contribution leaders make is not simply to today's bottom line; it is to the long-term development of people and institutions so they can adapt, change, prosper, and grow."

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QUESTIONS
THANK YOU