

Succession Planning

*Making this CRITICAL conversation
LESS SCARY . . . and MORE
PRODUCTIVE*

-- A keynote WORKSHOP --

APWA State Conference - 5/21/2014

(alternate title)

But I'm Not Dead Yet

*Overcoming the Fear of Succession
Planning*

-- A keynote WORKSHOP --

Scott Patchin

- » Holland, MI
- » My mission
- » 15+ years in HR / Leadership Dev
- » 5 Years as an entrepreneur
- » Author (and soon to be again)

Learn more - visit thetrugroup.com / LinkedIn

When you think of succession planning, what ONE word comes to mind?

Text 220717 and your message to 22333



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Succession Planning is . . .

- » Managing the risk of losing key people
- » Focusing on the development of top leaders
- » Yearly conversation with key people -
focused on re-recruiting and development
- » Proactively aligning talent with strategy

Succession Planning is NOT . . .

- » Promising future roles to people
- » Only about planning for disasters
- » JUST an executive discussion
- » Easy

Why we don't do it . . .

- » Job loss/irrelevance worse than death
- » Risky: Not just OUR opinion
- » Not ADD friendly process

As we start this conversation, what is one burning question you have on succession planning?

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Succession Planning

- » My Beliefs
- » Key terms you need to know
- » Process overview / How it works
- » Workshop - Key people / Key roles
- » Tips for finding talent

My Beliefs

- » Great conversations start with a question
- » Honest conversations: Foundation of great relationships
- » Leadership is . . .
- » In great organizations, everyone leads
- » Motivation: Fear vs Love
- » Talent + Work
- » Individuals own development / organizations support
- » TRUST is a gift
- » All organizations have A, B, C players

Key Terms

- » High Potentials
- » Deep Pros
- » Talent = People
- » Talent Profile
- » 9 Box

Key Terms

- » Individual Development Plan (IDP)
- » Key Role Profile (job description)
- » Pipeline

Key Role - Talent Pipeline



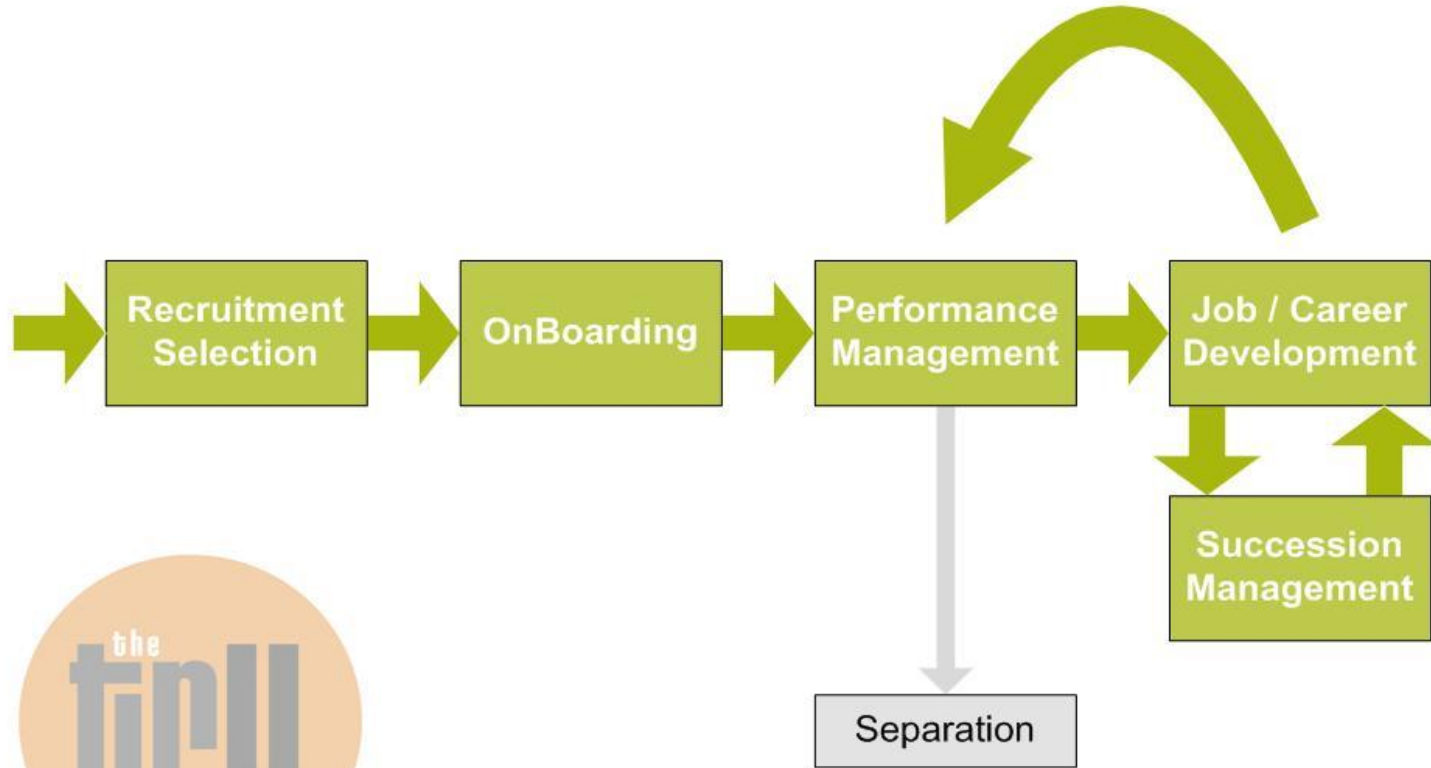
Position 1

Position 2

Position 3

Ready Now	Ready 1-2 yrs	Ready 3+ yrs

Talent Management: TalentFlow™

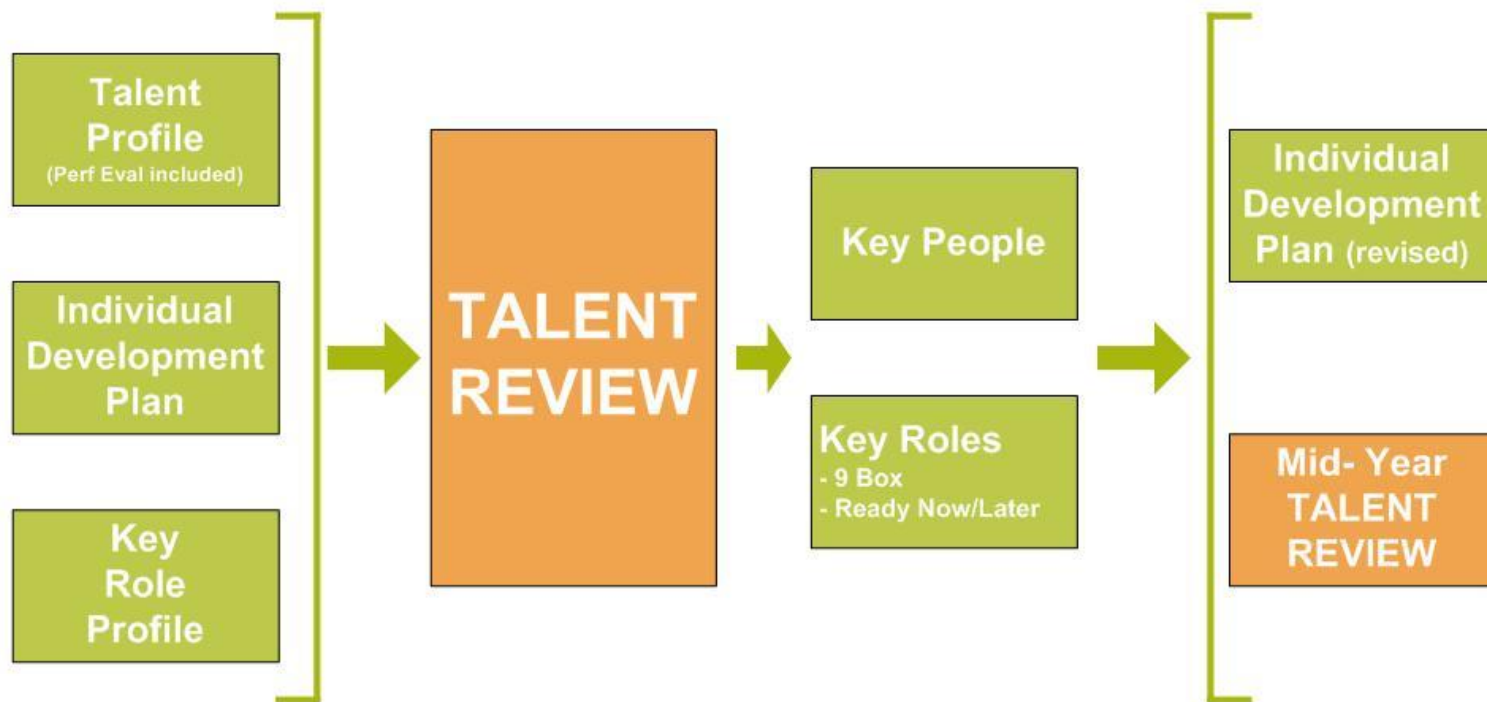


Key Step: Change the name

Strategic Talent Review

- » Key People
- » Key Roles

Succession Management Process



Exercise 1: Key People

Key People - Those people that, if they left, would cause you a large amount of pain and/or risk to your business.

- » 1. Name them (column 1)
- » 2. What is their role? (column 2)
- » 3. Why are they so valuable? (column 3)

Do 100% of your key people have
performance evaluations?

Text: 225336 for Yes, 225339 for No, 225340
for Not sure to 22333

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Exercise 1: Key People

Rate their performance (column 5):

- » **A** Great performer / Great attitude / want to take on more
- » **B+** Strong performer / Great team player / content in role
- » **B** Solid performer / little interest or capability to grow
- » **B-** Solid to exceptional contributor, not a positive influence on the team and/or does not make anyone else better
- » **C** Things run better when they stay home

Do you have any C/B- ratings on key people?

Text: 225578 for Yes, 225613 for No to 22333

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Debrief: Key People

- » Competence is rarely/never issue
- » Key people <> highest potential
- » Powerful mentors

Exercise 2: Key Roles

Key Roles - The roles that are most critical to your business. If you do not have great people in those roles your business does not work.

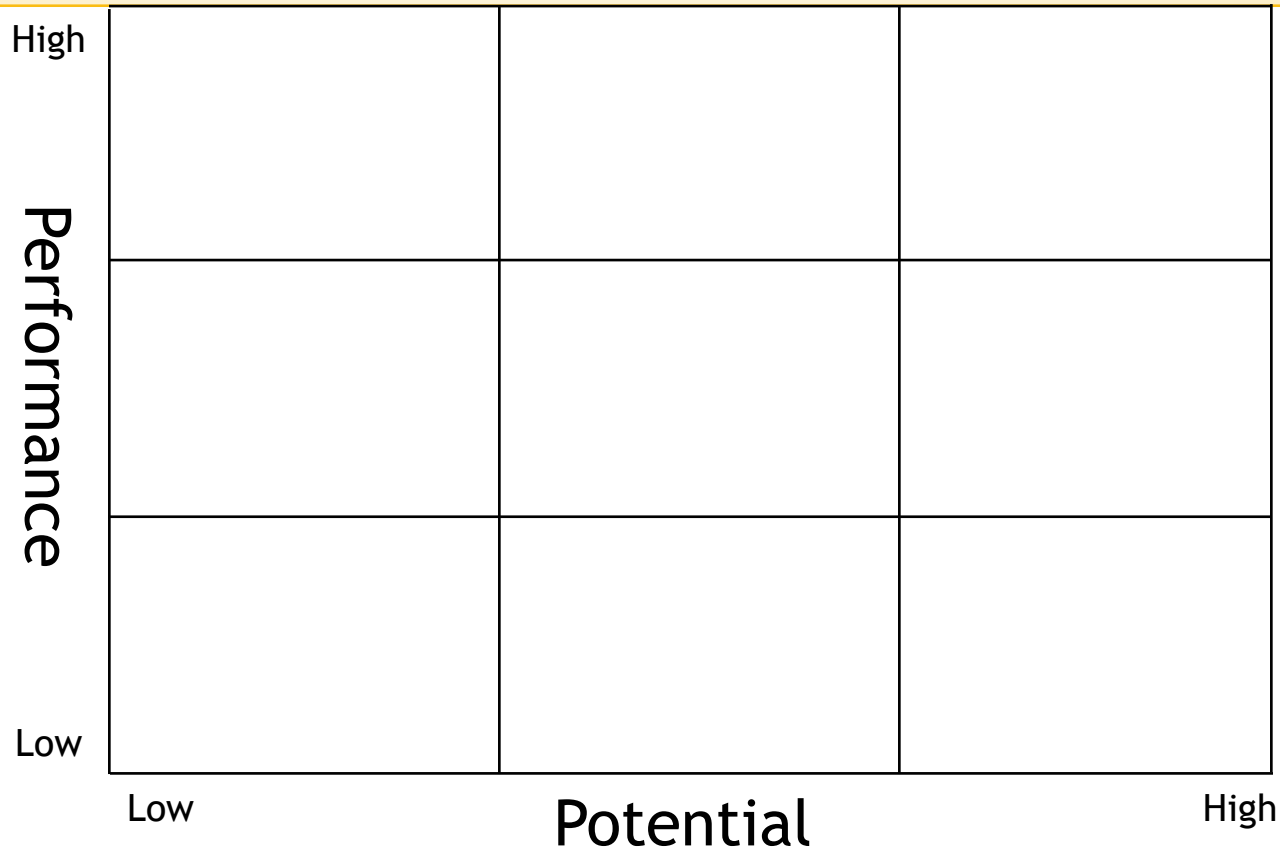
Step 1 - Name all Key Roles

Exercise 2: Key Roles

Step 2: Identify one role from your list that has the most people in it.

Final Step: For each person on the list, graph them on Performance/Potential chart.

9 Box



Performance	High	Professional Subject Expert	Agile High Performer	Star
	Medium	Solid Performer	Core Performer	Rising Star
	Low	Termination Risk	Inconsistent Performer	Potential Gem
		Low	Medium	High
		Managerial Potential		



Exercise 2: Key Roles

- » 1. Who is Ready Now (or with assistance)?
- » 2. Ready in 1-2 years?
- » 3. Ready in 3+ years?

Key Roles - Talent Pipeline

	Ready Now	Ready 1-2 yrs	Ready 3+ yrs
Position 1			
Position 2			
Position 3			



Debrief: Key Roles

- » Pipeline is critical
- » Full pipeline requires continuous work
- » Key roles NEED to be best people

3 Tips to Fill Your Pipeline With Talent

TIP 1. Tell Your Story EXCEPTIONALLY Well

» Job Description - WHY and WHAT

» What is great about your organization?

- » **Title:** Human Resources Assistant
- »
- » **Qualifications:**
 - » Baccalaureate degree required, advanced degree preferred;
 - » Excellent oral and writing skills;
 - » Strong organizational skills;
 - » Attention to detail;
 - » Skilled in use of Office software including communications software & programs;
 - » Excellent personal and professional references.
- »
- » **Reports To:** The Human Resource Assistant reports to the Director of Human Resources and assists company managers with HR issues with the guidance of the Director of Human Resources.

- » **Title:** Human Resources Generalist

- » _____ is a growing organization that is building a team of professionals to provide leadership and support for our five Detroit area schools serving the educational needs of 2,800 Pre K -12th grade students. We are looking for an experienced human resources professional to lead the staffing and employee relations needs for these schools.

- » The ideal candidate is self driven, able to manage a large number of tasks, and is looking for a leadership role in human resources.

- » _____ operates XX schools throughout Michigan. The mission of _____ is to empower every child with knowledge, skills, character, and work ethic to achieve the American Dream. ____ always strives to meet three fundamental and unchanging standards:
 - »
 - » ...
 - »

3 Tips to Fill Your Pipeline With Talent

TIP 2. SHOW you invest in people

- » Hire / Onboard well
- » Lead well (can't fake this)
- » Use current people to recruit for you

Do you have a LinkedIn profile?

Text: 228767 for Yes, 228771 for No, 228782
for *What is LinkedIn?* to 22333



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3 Tips to Fill Your Pipeline With Talent

TIP 3. DON'T wait for posting to fill pipeline

- » Use LinkedIn to find people / connect
- » Get to know KEY PEOPLE lunches: Goal = 1 per month
- » Treat your people well, then ask them for help

Next Steps

Stay Connected? C - - S - - T on business card. I will draw 1 winner to receive a packet of resources for developing yourself and your people and 1 hour of free coaching. I have a NO SPAM promise.

I will post a link to my presentation on Facebook and LinkedIn. A Like would be appreciated.

About the Speaker - Scott Patchin

Scott has a core belief that the habits leaders practice and the conversations they have with their people are the keys to their success. He launched his own leadership development company, The trU Group, in 2009 around the mission of helping others realize the excellence they were born to achieve.

He has work experience manufacturing, healthcare, and banking/mortgage industries. He is an author, blogger, coach, and delivers a *hands-on* keynote. He resides in Michigan and has spoken across the Midwest on leadership and individual development.

Learn more: | [LinkedIn](#) | www.thetrugroup.com