

# 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](http://thetrugroup.com) / LinkedIn

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

# 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?



# Succession Planning

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

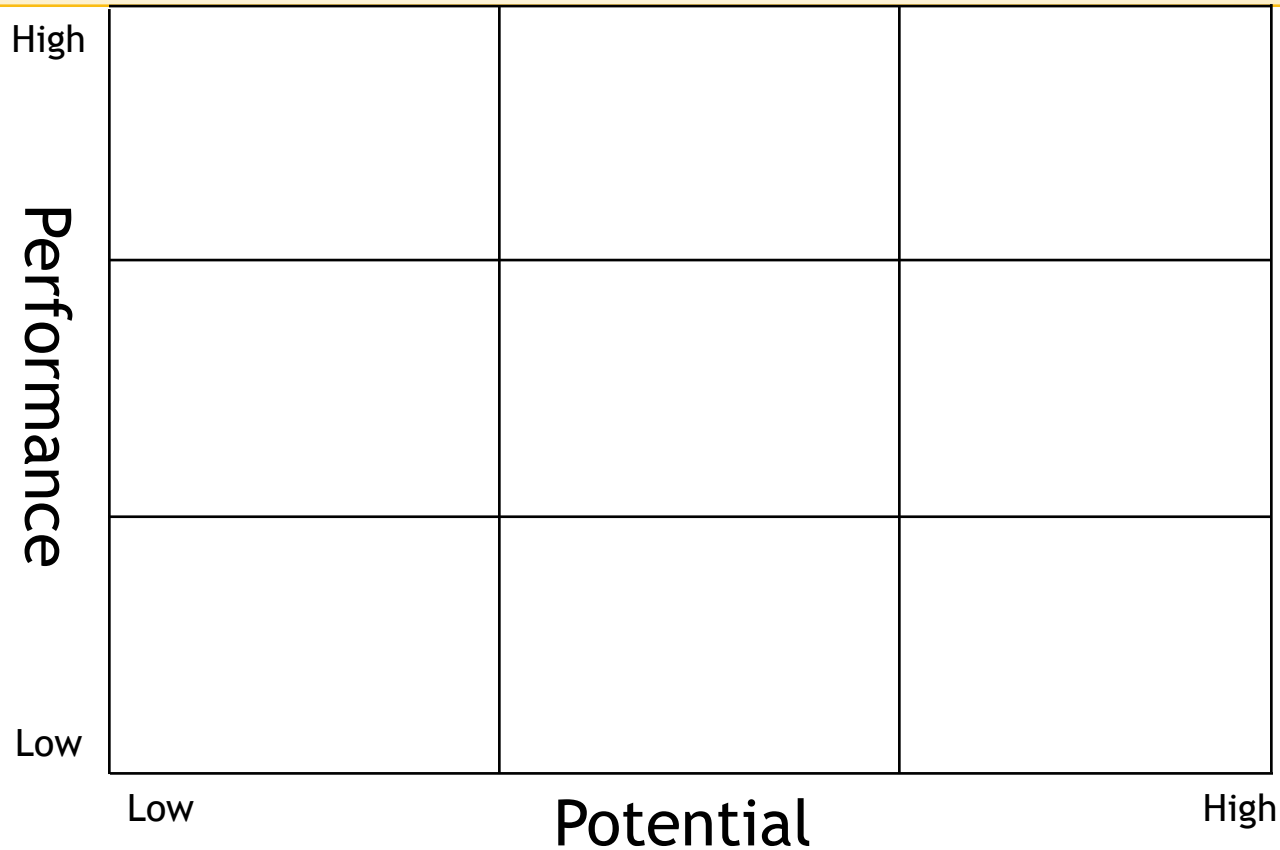
# My Beliefs

- » 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

# 9 Box



# Key Terms

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

# Key Role - Talent Pipeline

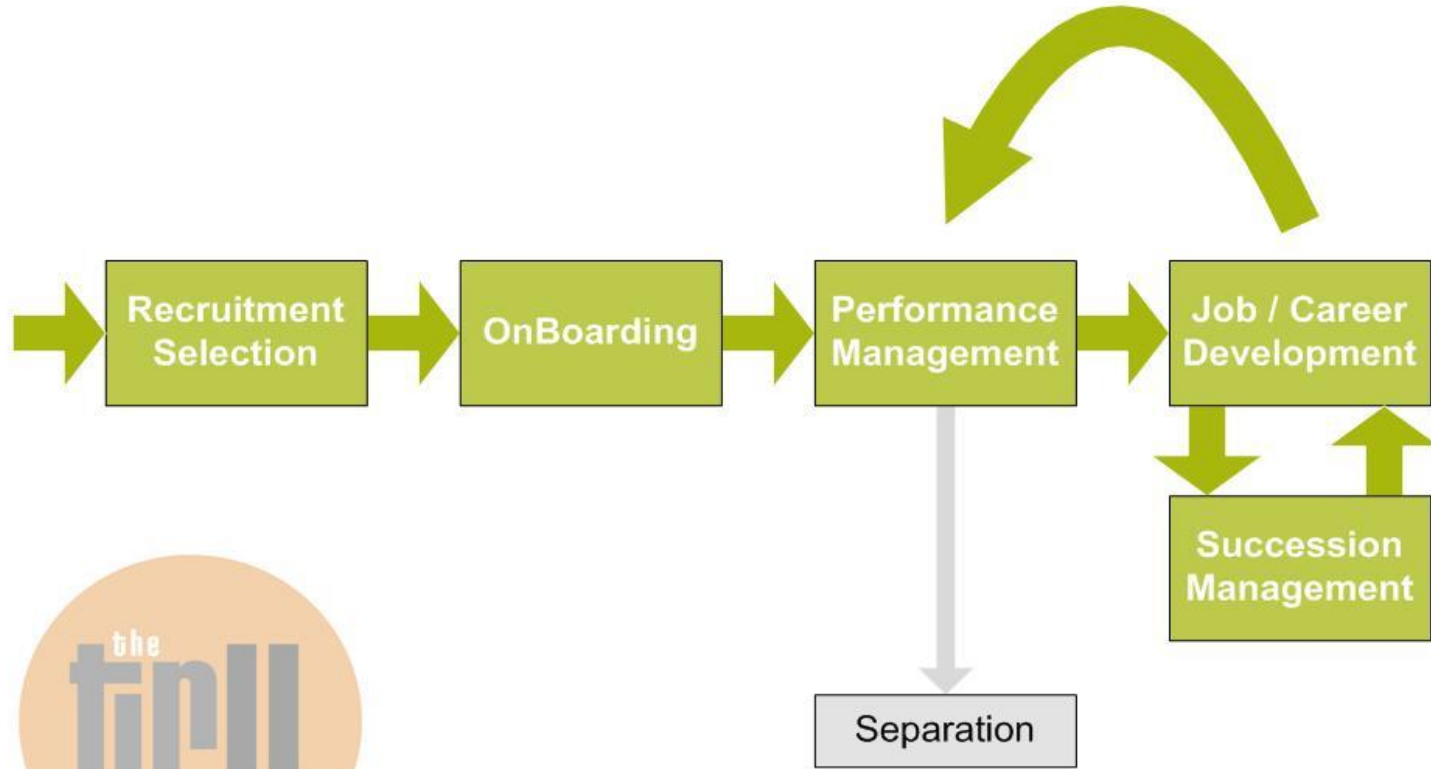
Position 1

Position 2

Position 3

Ready Now	Ready 1-2 yrs	Ready 3+ yrs

# Talent Management: TalentFlow™



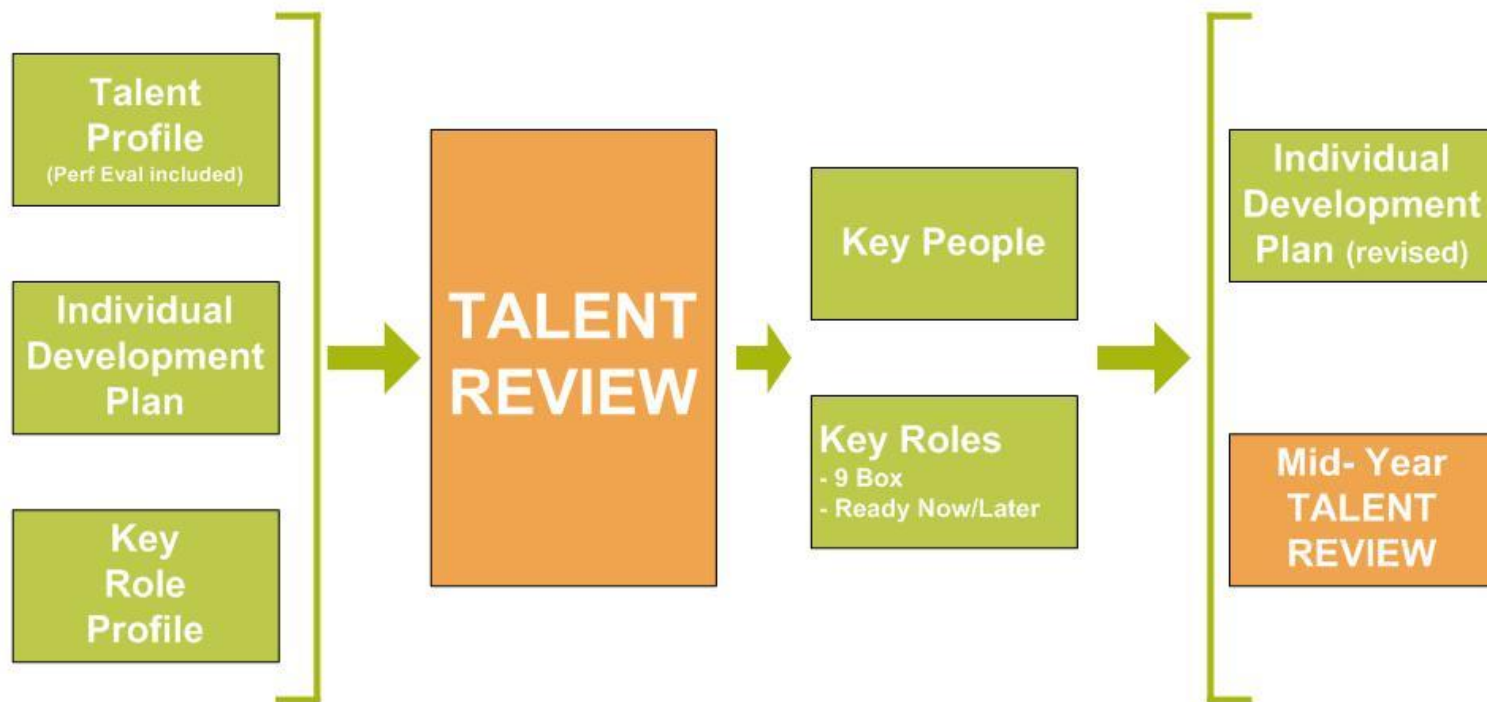
# Key Step: Change the name

## 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?



# 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?



## 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.

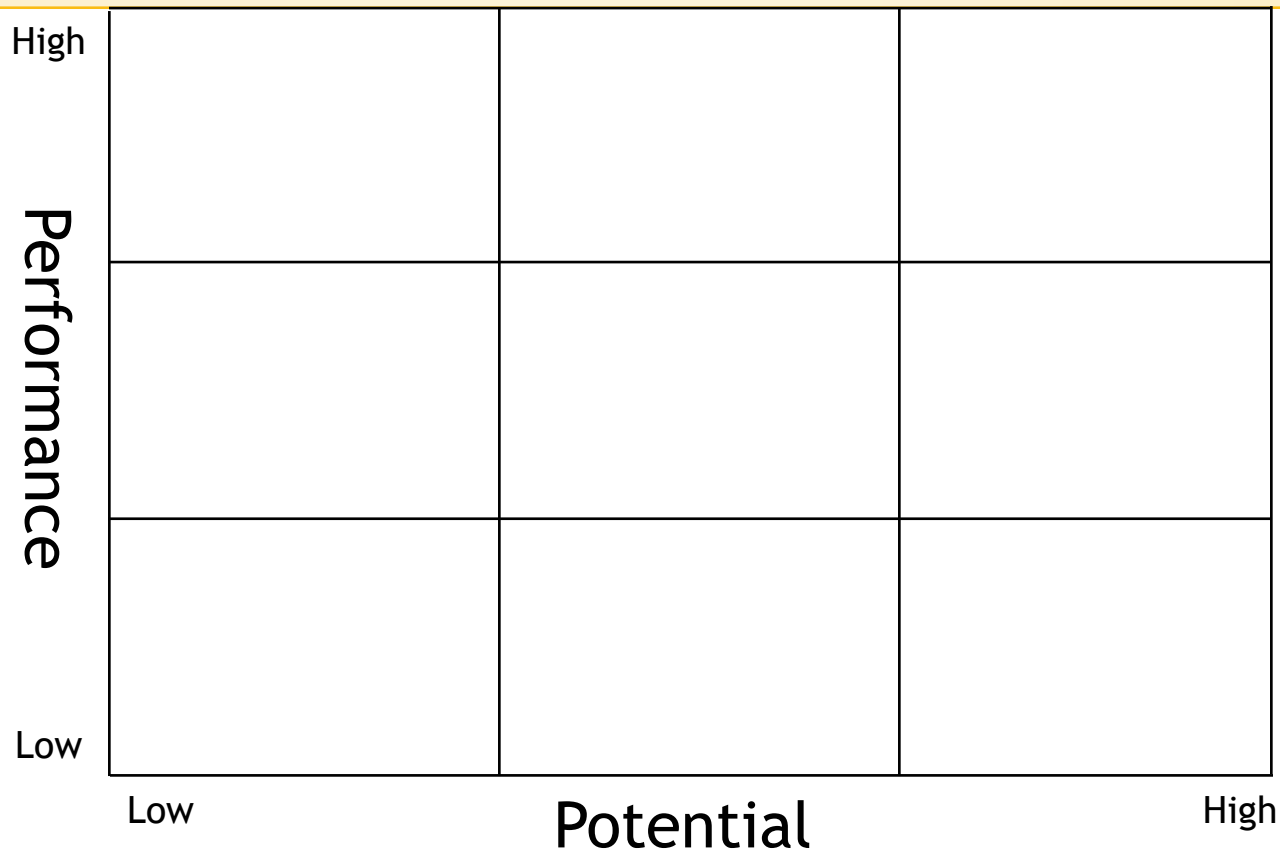
Step 1 - Name all Key Roles

## 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





## 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

Position 1

Position 2

Position 3

Ready Now	Ready 1-2 yrs	Ready 3+ yrs



## Debrief: Key Roles

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



Do you have a LinkedIn profile?

# 3 Tips to Fill Your Pipeline With Talent

TIP 1. Tell Your Story EXCEPTIONALLY Well

TIP 2. SHOW you invest in people

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

## *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](http://www.thetrugroup.com)