



PI[®] Fridays with Bob

March 25th, 2011

Succession Planning

Bob Wilson, Facilitator

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Succession Planning

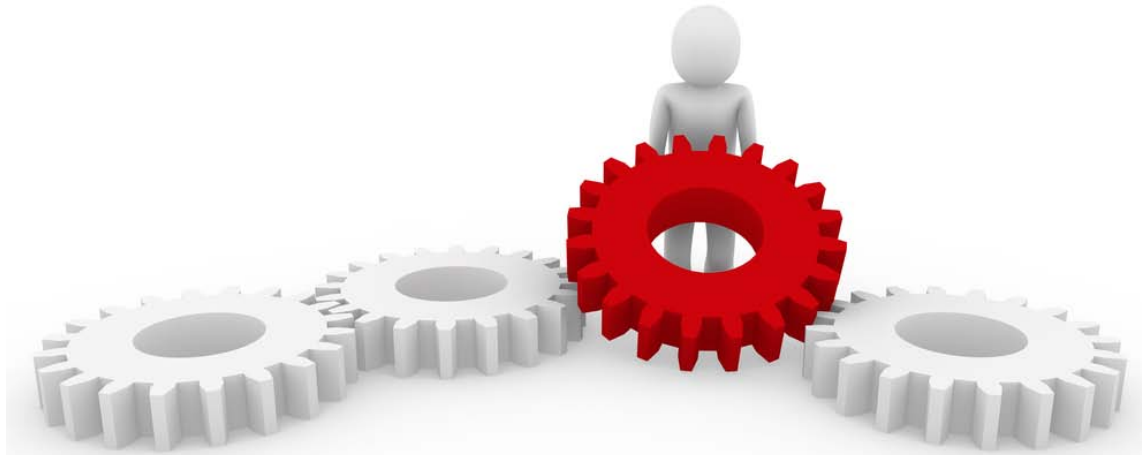
- **Introductory comments**
- **Succession for individual jobs**
- **Connection to strategic planning**
- **Benchmarking jobs**
- **Evaluating people**
- **Bridging the gaps**
- **Concluding remarks**

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Where to begin?





Losing people,
especially
important,
valuable people,
is always hard.
Be prepared to
bridge the loss.



Middle Management/ Single Contributors

Avoid swinging
to the opposite
end on the
characteristic
that the team
wants changed.



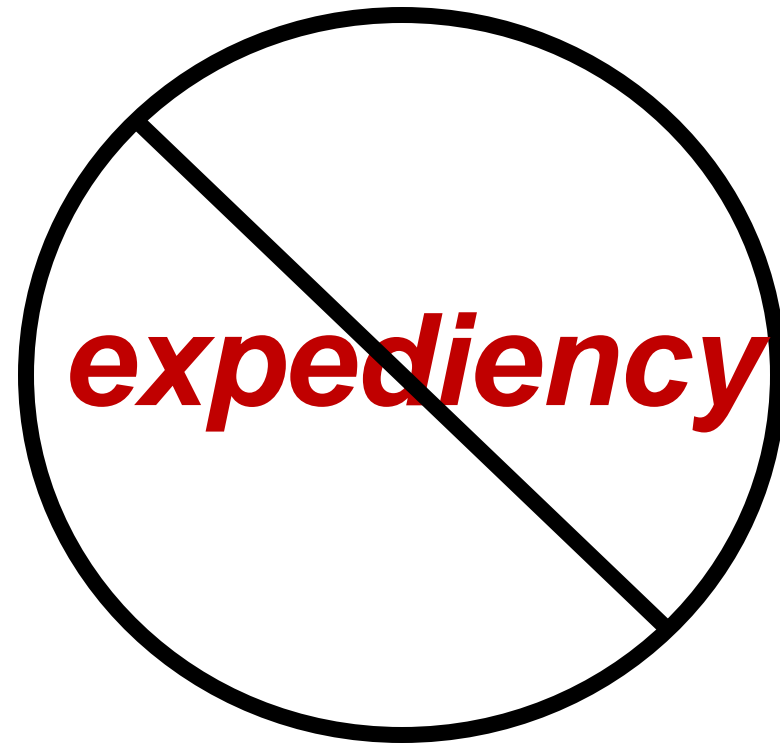


What's wrong:

1. No succession plan
 - a. No potential candidates tabbed
 - b. No introductory training
2. No discussion of KPRs
3. No PRO form
4. No further job definition



Short cuts driven by a sense of desperation – even when driven by an immediate need - generally cause bigger problems down the line.





Succession Planning Process

- Start with the Strategic Plan
- Benchmark existing jobs
- Evaluate your people
- Fill the gaps



Benchmark your jobs

- KPRs (key performance requirements)
- personality requirements
- behavioral competencies
- intelligence measures



Competency Examples

- business acumen
- customer focus
- strategic insight
- vision and purpose
- values and ethics
- action
- commitment
- teamwork
- innovation
- staffing
- developing people
- performance



Management Competencies

Examples from ADVISA Office Manager

- **Effective Communication** – Clearly conveys information and ideas to others both verbally and written. Proactively shares information of both a positive and negative nature. Ensures others understand what has been conveyed and freely supplies additional information as necessary.
- **Accountability** – Accepts responsibility for outcomes of his/her work.
- **Teamwork** – Effectively works and collaborates with others to address common issues and reach common goals.
- **Judgment/Decision Making** – Makes timely and sound decisions. Makes decisions under conditions of uncertainty.
- **Problem Analysis** – Gathers relevant information systematically. Considers a broad range of issues or factors. Grasps complexities and perceives relationships among problems or issues. Seeks input from others. Uses accurate logic in analysis.
- **Initiative** – Self Starter. Proactive. Anticipates problems and works on them before they become a crisis.
- **Inter-organizational Contribution** – Effectively supports project work and company efforts beyond departmental, functional, or location boundaries. Works effectively with indirect, “dotted line” reporting relationships.



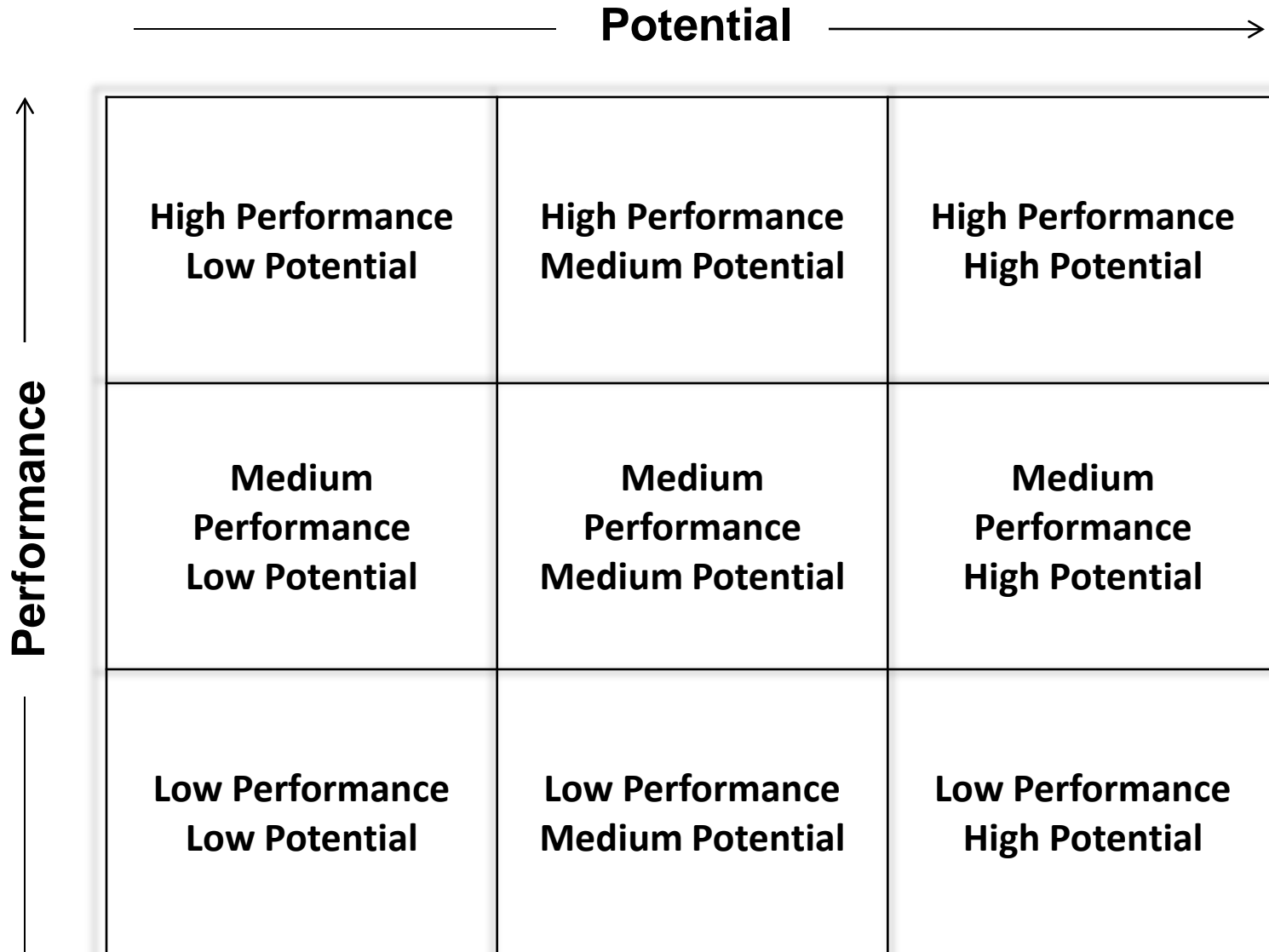
Filling the Gaps



- 360
- 9-Box
- Coaching



9-Box Matrix





Coaching





Coaching



- Gain agreement on the issues to be addressed
- Identify implications of the current behaviors
- Create solutions that leverage the person's strengths
- Create an action plan that addresses the targeted behaviors



Creating a Plan

- Senior leader bus scenario
- Natural stepping stones
- Bench players for key positions
- 5-year window



ADVISA





Succession Planning

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Questions for Bob





Next Session

Friday, April 29th

9 a.m. ET

Topic: “The A Drive”

*In the meantime, visit our blog at:
<http://blog.advisausa.com/blog/advisa>*

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