



Direction!

“Breaking the Code” on Strategic Seccession Planning

You’ve been thinking about how a lot of your more “experienced” team members are retiring / have retired recently and the increase in turnover because some of your younger team members are obviously not as interested in longevity as they are opportunity. This “brain drain” is a key concern of a very large number of organizations in the world today because of the aging “Baby Boomers” out there. To top it off, the boss just let us know that she/he wants your seccession plan submitted by the end of the week for review and roll up. You received no guidance or instructions; but it’s too simple a task to spend time “over thinking” ...right? The answer depends on what you are trying to achieve and how you measure success. We need to determine if we are doing a seccession plan for an individual or for an organization. They are similar, but individual seccession plans are much simpler to execute than organizational strategic seccession plans. If you are serious about trying to develop and promote your future leaders and ensure your organization succeeds far into the future and grows to obtain its true potential...well then, your effort is going to require an entirely different approach! This column is focused on helping you develop and create an effective strategic organizational seccession plan.

The first failure mode people get themselves into is that they begin by reviewing current employees and plugging them into their next anticipated assignments. Anything left over is assigned to “HR” to fill the gaps through recruitment. Not a bad approach if you are simply trying to get this task off your desk! Strategic seccession planning requires a completely different mindset and should never be confused with planning our normal training opportunities and personnel development. Every employee should be encouraged to take any and all available courses and training sessions that can help them reach their full potential. What is different is that when we are analyzing and evaluating each of our current employees for strategic seccession planning, we should be using the lens of what they can become, not what they can do.

Your first step to exercise great leadership and true strategic thinking should be to determine what your organization is going to look like and accomplish five to ten years from now. Only then will you know what skills and talent you will need to fuel those organizational requirements! Next, determine exactly what will be needed by your organization to provide that type of product, that level of service, or that exciting new innovation in R&D or development. Then we analyze the skill sets these new capabilities will require in the future that we do not currently possess or do not reasonable believe that our current employees can obtain efficiently. Next, we identify the delta/difference in these skill sets that we need to specifically address in our strategic seccession plan. We also need to establish a timeframe for when these skill sets will be needed. Next, we decide who has the ability needed to acquire the skills they will need going forward! Not everyone who is doing a great job today can do a great job of what is going to be asked of them for the organization of tomorrow!

Now you are ready to combine the job requirements and skills sets needed with the timeframe. This provides you with a recruiting strategic plan that your HR team and your management staff can begin to execute against. Once you have decided who has the capability to become what we need for our strategic vision, you have to develop a specific plan for them to get the right training and coaching to develop the skills required. Just

providing people with training for the sake of training is good, but highly ineffective at getting the right people the right expertise to prepare for your future requirements.

Next develop a training plan for the new recruits you will need to become proficient to an acceptable level for future skill sets. It may be hard work to establish job requirements and skill sets needed for a job that doesn't yet exist, but this is the foundation of our ability to grow and develop our organization to meet the challenges we will be guiding ourselves to face as we execute our visionary Five to Ten-Year Plans!

Last, but not least, is the part where we begin to look at the transition process for those leaders, managers, and employees who will be leaving the organization for any of a myriad of reasons. A carefully planned transition can help pass along extremely valuable knowledge from the senior member to the gaining member. Giving people notice and helping them make plans and assisting them with the next segment of their career or retirement is the right thing to do. It also sends the message to the rest of the team that we care about our people and that as we grow and change we are not going to just leave people behind. Put plenty of thought into this aspect of your succession plan because it will determine to a large degree the culture of your organization and the degree of trust and loyalty your team will develop going forward!

Only when we fully understand what we will need, can we then equate that to what our people will need to be able to do or provide, to ensure our vision comes to life. This only seems difficult because it is! Not everybody can see the future, identify its requirements, and plan for success. Remember... See the need; Seize the opportunity; Lead by example and from the front; and Share the victory!

J. R. McGee

President and CEO

1248 Queen Street, Pottstown Pa 19464

www.x-slg.com

610-212-6728

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