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Eureka[®]

Leadership-Management-Team Building-Well Being-Environment

Making a Difference[™]



Effective Talent Management and Succession Planning

CONTENTS

•	Aim	3
•	Succession Planning –Definition	4
•	WHAT IS SP? Why SP?	5
•	Outcomes	6
•	Talent Management	7
•	Contemporary Issues: Changing Nature of Work & Organization	8
•	Elements of Career Management	9
•	The Hierarchy – Expected	10
•	The Hierarchy – Current	11
•	Talent Matrix A	12
•	Talent Matrix B	13
•	Who would you promote to the open position?	14
•	Who’s the best mentor for an “A” player?	15
•	Talent Management, Succession Planning and Performance Matrix Concept Chart	16
•	Performance Management: it comes together here!	17
•	Succession Planning Model A	18
•	Succession Planning Model B	19
•	Benefits of SP	20
•	SP Best Practices – Common Themes	21
•	Challenges in SP	22
•	Talent Review Discussion	23
•	Individual Development Plan	24
•	Integrated Training	25
•	The Alignment Juggle	26
•	Development (Old and New Approach)	27
•	Leadership Development System	28
•	10 Great Part-Time Assignments	29
•	Leadership Developers	30
•	Remember	31

Aim

- Foster a process of building leadership capability across the lines of business / support functions
- The emphasis is on developing a broad spectrum of talent within the management ranks so that the availability of internal talent will not be a constraint to the organization's strategic direction
- Identify the key leadership success factors

Succession Planning -Definition

Strategic, systematic and **deliberate** effort to develop competencies in **potential leaders** through proposed learning experiences such as targeted rotations and educational training in order to fill high-level positions without favoritism (Mathew Tropiano, 2004)

Deliberate and **systematic** effort by an organization to ensure **leadership continuity** in key positions and encourage individual advancement (St-Onge, Mercer)

A **structured** process involving the **identification** and **preparation** of **potential successors** to assume a new roles

WHAT IS SP?

- Constant change planning
- An organizational journey, not a project
- Ensuring continuity of leadership
- Identifying gaps in existing talent pool
- Identifying and nurturing future leaders

Why SP?

Organization supersede Individuals

– visionaries are those who groom their young ones to take the lead position and to take the cause of organization forward

Outcomes

- Retention and development of high potential employees
- Builds internal staff capabilities (bench strength) for the emerging organizational demands
- Maps various succession options
- Facilitates developmental moves across the organization
- Establishes a professionally managed organization with the systems in place to ensure that it will have effective leaders going forward

Talent Management



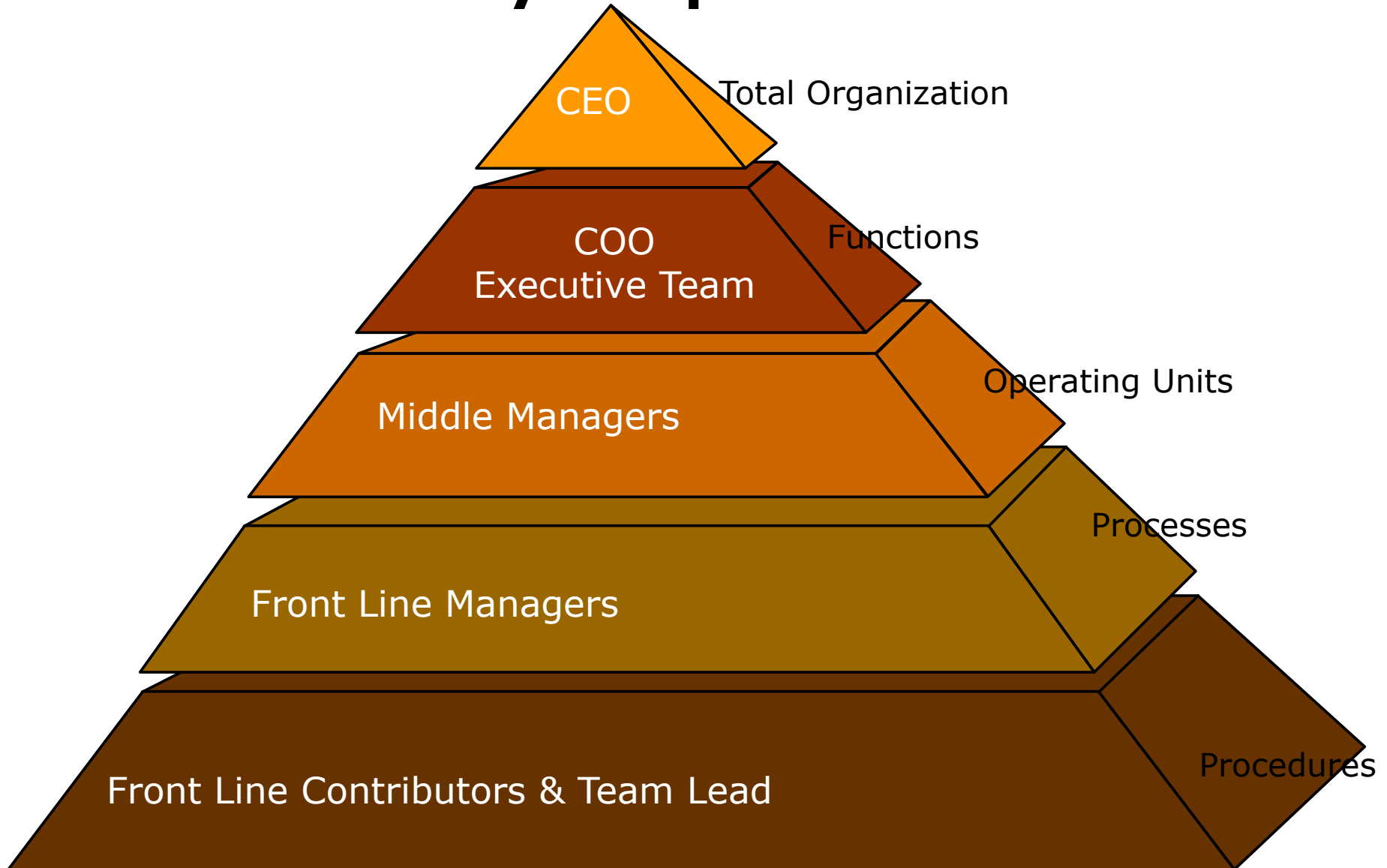
Contemporary Issues: Changing Nature of Work & Organization

- Demographics (net-generation, diversity)
- Globalization
- Technology
- Redefined concept of 'Reliability'
- Challenges in differentiating high performers from poor performers
- Wanted Rapid career progression

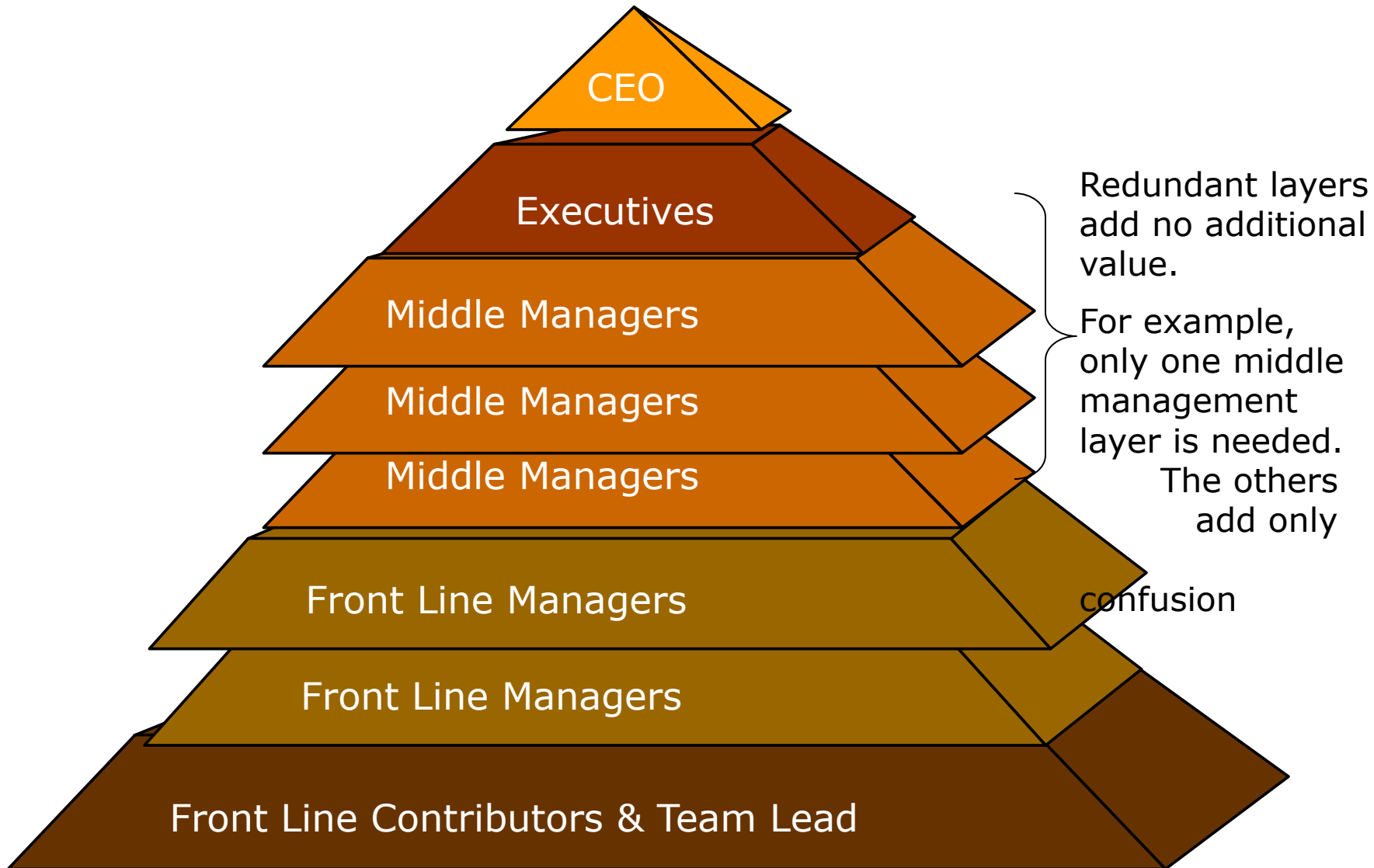
Elements of Career Management

1. Individual (Self) Assessment of Abilities, Interests, career need and goals
2. Organizational Assessment of employee abilities and potential
3. Communication of information concerning career opportunities with the organization
4. Career Counseling to set realistic goals and plan for their attainment

✓ The Hierarchy - Expected



X The Hierarchy - Current



Talent Matrix

Doing the right things ↑

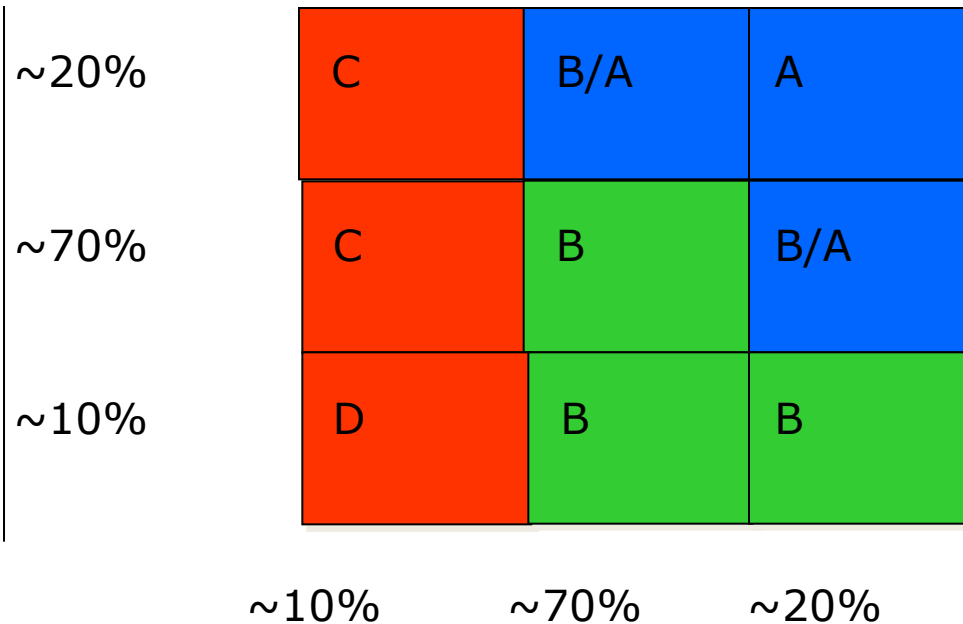
<p><i>Diamond in the Rough?</i></p> <ul style="list-style-type: none"> • Loose Cannon? • Problem child? <p style="text-align: right; font-size: 2em;">7</p>	<p><i>Future All Around Star</i></p> <p style="text-align: right; font-size: 2em;">3</p>	<p><i>Consistent Star</i></p> <ul style="list-style-type: none"> • Fully developed • Excellent in role • Needs more responsibility <p style="text-align: right; font-size: 2em;">1</p>
<p><i>Future Utility Player</i></p> <p style="text-align: right; font-size: 2em;">8</p>	<p><i>Utility Player</i></p> <ul style="list-style-type: none"> • Solid citizen • Adequate in role <p style="text-align: right; font-size: 2em;">5</p>	<p><i>Utility Pro</i></p> <ul style="list-style-type: none"> • Fully competent in role • Still developing • Nearly ready for more responsibility <p style="text-align: right; font-size: 2em;">2</p>
<p><i>Take action now</i></p> <ul style="list-style-type: none"> • Not developing • Not competent • No potential • In wrong job • Move out <p style="text-align: right; font-size: 2em;">9</p>	<p><i>Future Pro</i></p> <ul style="list-style-type: none"> • Still developing • Not yet exceptional in role • Has potential to improve • Monitor development <p style="text-align: right; font-size: 2em;">6</p>	<p><i>Technical Pro</i></p> <ul style="list-style-type: none"> • Fully competent in role • Reached their potential <p style="text-align: right; font-size: 2em;">4</p>

Getting the right results →

Talent Matrix

Doing the right things

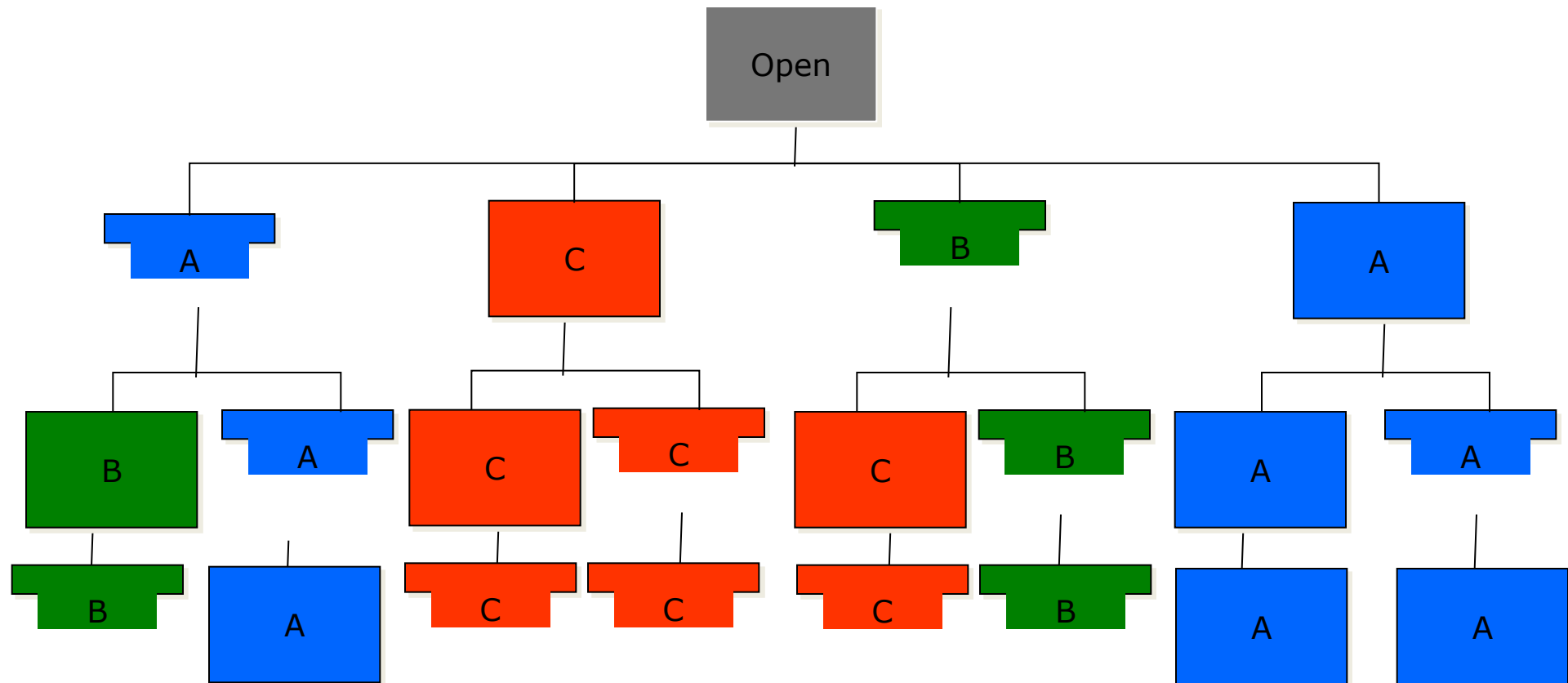
- Based on competency intensity and scope scores
- Acting the right way
- Manifesting the values
- HOW one performs



Getting the right results

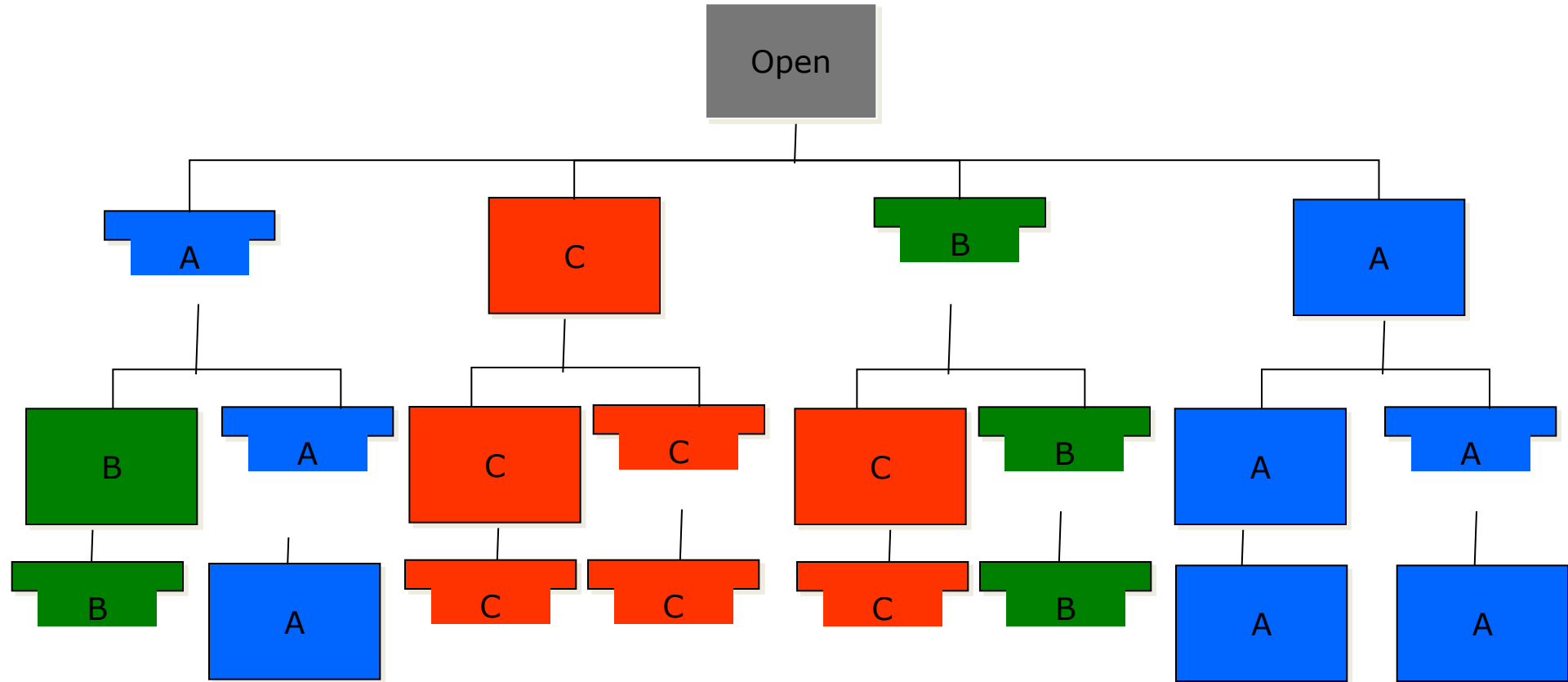
- Based on balance results scores
- AND reviews of results
- Expected distribution & how one stacks up compared to others
- How WELL one performs

Who would you promote to the open position?



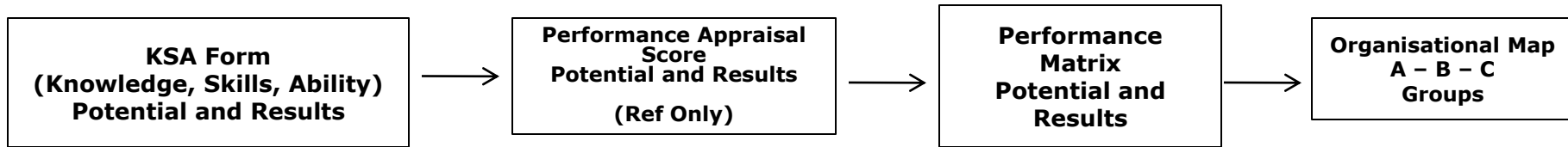
- Identifies talent gaps – functional, geographic, diversity mix, etc.
 - Reveals scale of recruiting needed in the next year or two
 - Identifies any issues/challenges affecting the talent pool
- development shortfalls, retention problems, weakness in the value proposition, etc.

Who's the best mentor for an "A" player?



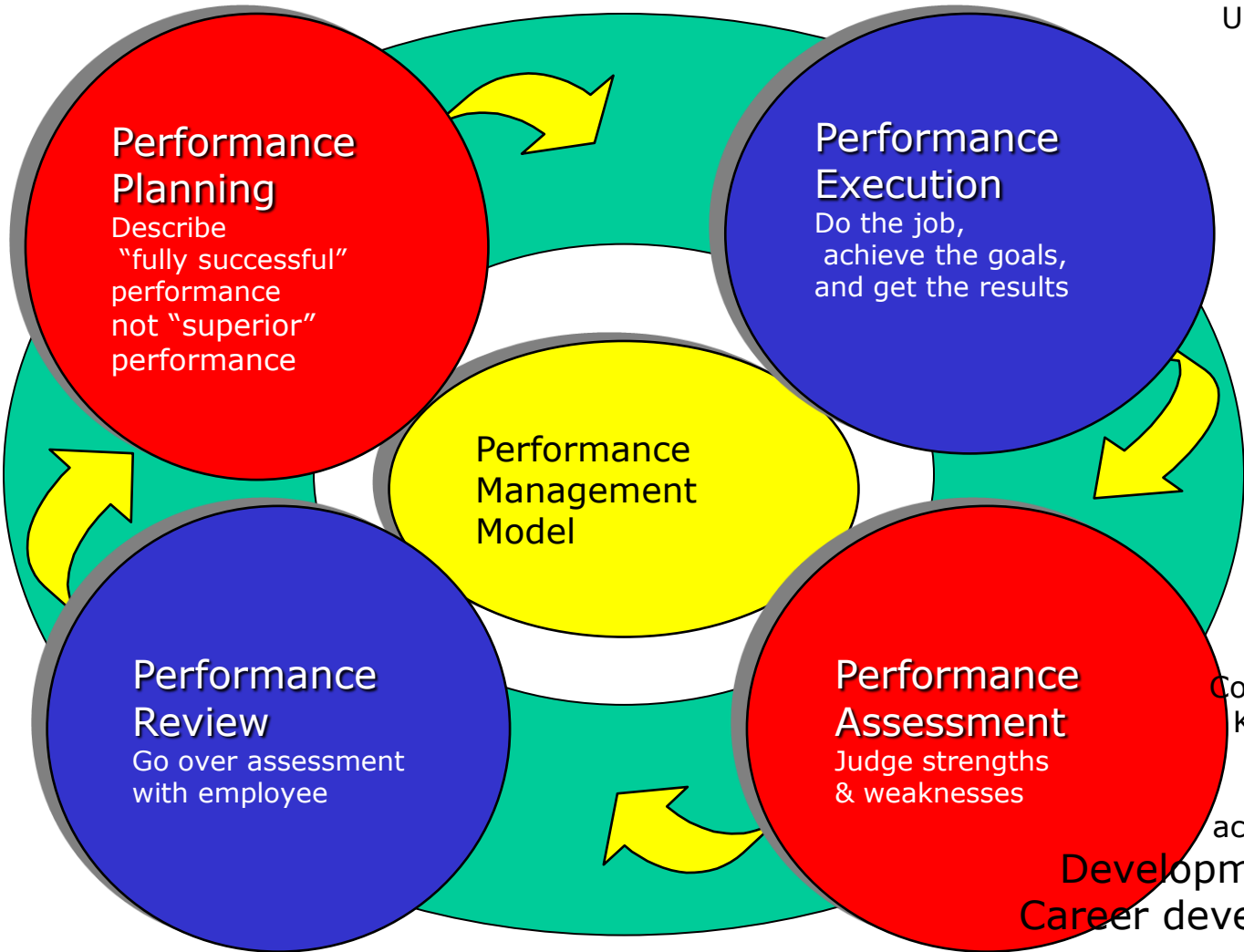
- Promote "A" Players to leadership roles
- Assign "A Players" to "A Player" bosses
- Assign developing "A Players" to "A Player" Mentors
- Remove "C Players" from blocking positions

Talent Management, Succession Planning and Performance Matrix Concept Chart



Performance Management: it comes together here!

Agree on goals
Link to state and agency goals
Agree on responsibilities , tasks & projects

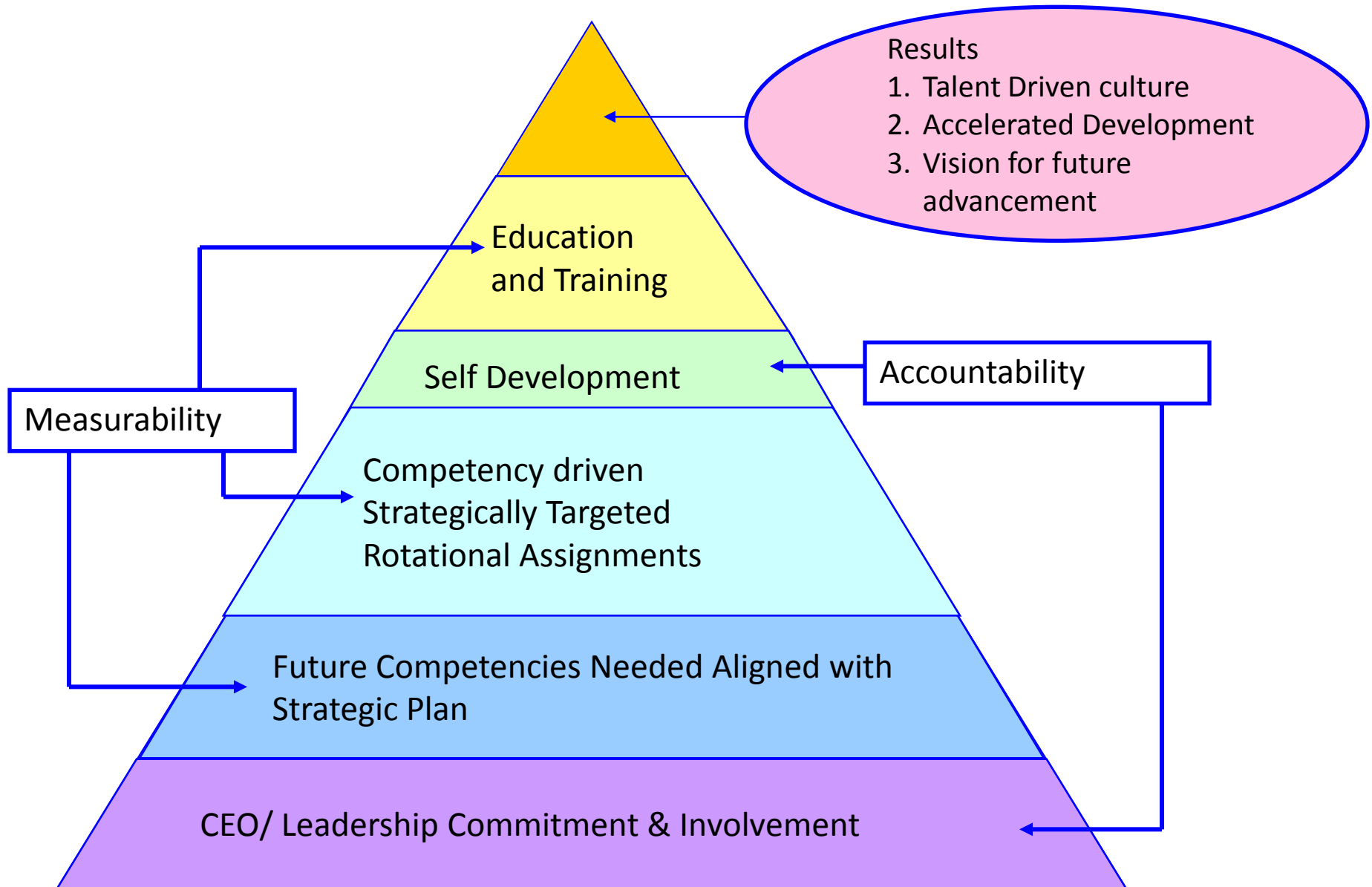


Performance log
Updated goals
Mid-year or quarterly review

Gain understanding
Don't have to agree

Results
Competencies
Key tasks or activities
Major achievements
Development plan
Career development

Succession Planning Model A

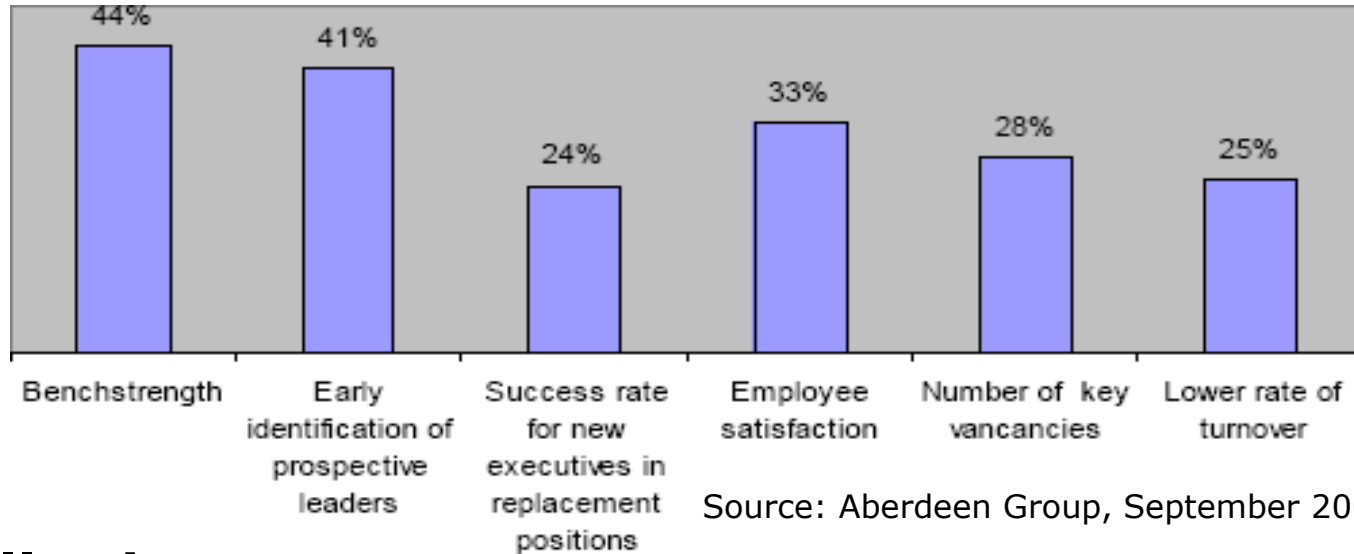


Succession Planning Model B

Suggestions for a fair and equitable succession planning process

<p>1. Communicate Possible Opportunities</p> <ul style="list-style-type: none"> Inform employees of the possible job opportunities that are anticipated over the designated time period (e.g., next three years). Communicate what key competencies are needed for those jobs. That is, what level of demonstrated skills and knowledge is management looking for in potential candidates for these jobs? Inform employees of the succession planning process that the organization intends to use (e.g., the steps in this model). 	<p>2. Identify Who Is Interested</p> <ul style="list-style-type: none"> Open it up. Give employees the opportunity to indicate interest in possible job openings and willingness to participate in succession planning activities. Clarify that participation in succession planning is not a guarantee of advancement. However, participation could help one's chances. 	<p>3. Assess Competency Readiness</p> <ul style="list-style-type: none"> Assess individuals' readiness to assume possible job openings for which they have indicated interest. That is, compare the employee's present competency level to that required of the anticipated opening. Identify competencies that need development to help ready the employee for that job or occupation. It is advisable to use an assessment instrument that actively engages the employee as well as the supervisor in determining the employee's competency levels.
<p>4. Prepare Development Plans</p> <ul style="list-style-type: none"> Together with the employee, prepare an individual development plan that outlines specific activities that the employee engage in to develop needed competencies. Include a timetable with milestones for assessing progress. The list of activities and timetable should be reflected in the employee's EDPP. In addition to individual plans, it may make sense to have a group development plan applicable to core competencies for a particular occupation level that all interested employees should participate in. Consultation in preparing training plans and determining appropriate activities is available through the Department of Personnel's Training & Development Services. 	<p>5. Provide Development Opportunities</p> <ul style="list-style-type: none"> Help the employee follow through with the development plan by setting up training options and providing realistic time to participate in the training activities indicated in the employee's development plan. The employee should also take personal responsibility to take the initiative and seek out activities that will help develop the targeted competencies. This display of initiative and follow through can show that the employee is serious about succession and may, in itself, be a key competency. Training options go well beyond the traditional classroom setting and do not have to be costly. Examples of development activities include: mentoring, job shadowing, task force participation, special projects/assignments, Internet and journal research, conferences, time-limited job rotations, video/audio tapes, committee participation, etc. 	<p>6. Formalize Eligibility</p> <ul style="list-style-type: none"> For general service classified positions, employees typically must get on the appropriate job register to be formally eligible. Avenues to increase flexibility to formalize eligibility include: <ul style="list-style-type: none"> Use "until further notice" recruitment announcements so that employees can submit their application at any time Use desirable, not minimum, qualifications Streamline selection procedures – avoid using complicated multiple choice exams Use the "in-training" program that allows bringing the employee in at a lower level with automatic advancement to the higher level Use competency based classification structures For WMS and exempt positions, hiring procedures are flexible and established by the hiring agency.

Benefits of SP



Tells about

the extent to which leadership job openings can be filled from the internal pool

the av. no. of qualified candidates for each leadership position

the number of positions with two or more 'ready now' candidates

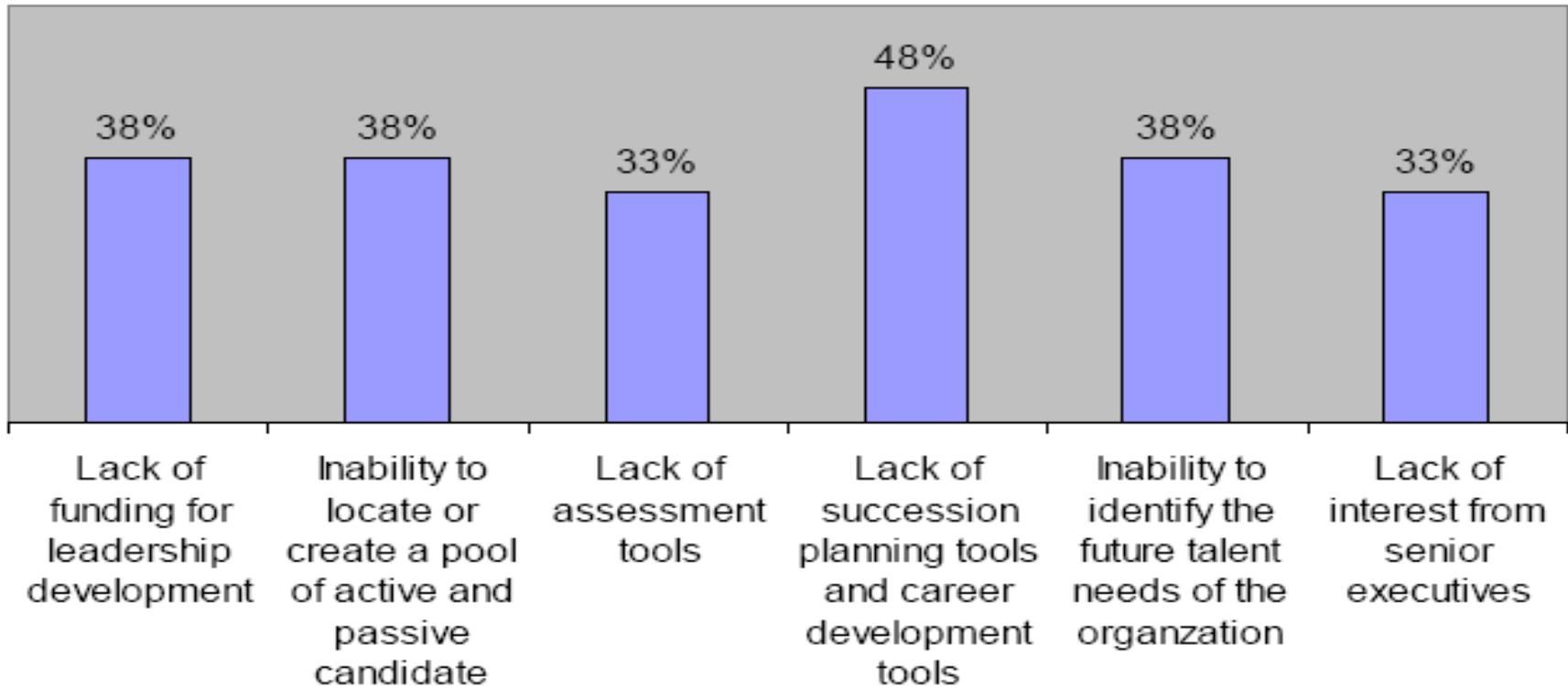
the attrition rate from the succession pool

Succession Planning "Best Practices": Common Themes

Topic	Recommendations	Exemplary source(s)
Overall process	<ul style="list-style-type: none"> • Tie methods to organizational strategic planning • Enlist top-level collaboration/endorsements • Involve departments and potential successors as process co-owners • Communicate openly; make the process as transparent as possible • Pilot test before broader roll-out 	<p>Herrera (2002) Rothwell (2002) Karaevli & Hall (2003) Conger & Fulmer (2003)</p>
Selection	<ul style="list-style-type: none"> • Identify a "talent pool"; multiple potential successors and multiple potential promotions • Develop formal selection criteria • Use multiple assessment methods • Provide manager training on selection 	<p>Burns-Martin (2002) Byham, Smith, & Paese (2002) Kesler (2002)</p>
Development	<ul style="list-style-type: none"> • Mandate development planning and follow-up as part of the process • Tie manager bonuses to planning participation and follow-through • Create development plans tailored to individual needs and succession opportunities • Use job rotations and other work-related projects for development 	<p>Rothwell (2002) Patton & Pratt (2002) Hicks (2000)</p>
Program maintenance	<ul style="list-style-type: none"> • Keep the process simple and efficient • Approach the process flexibly, and evolve it continuously 	<p>Conger & Fulmer (2003) Karaevli & Hall (2003)</p>
Evaluation	<ul style="list-style-type: none"> • Set specific goals for succession planning programs, and measure progress against them regularly 	<p>Kesler (2002)</p>

Garman & Gllawe, 2004

Challenges in SP



Source: Aberdeen Group, September 2006

Talent Review Discussion

Department:

Name:

Payroll No.:

Date:

Key strength:

1. Shows determination to achieve excellent results.
2. Finds better ways
3. Develops self and others

Key competency gap:

1. Adds values above expectation
2. Understand the customer
3. Optimizes effectiveness across the organization
4. Demonstrate interpersonal skill
5. Builds skill for the future

Key development needs:

1. Effective project management
2. Communication skills
3. People inspiration

Manager signature

Employee signature

Individual Development Plan



Department:

Name:

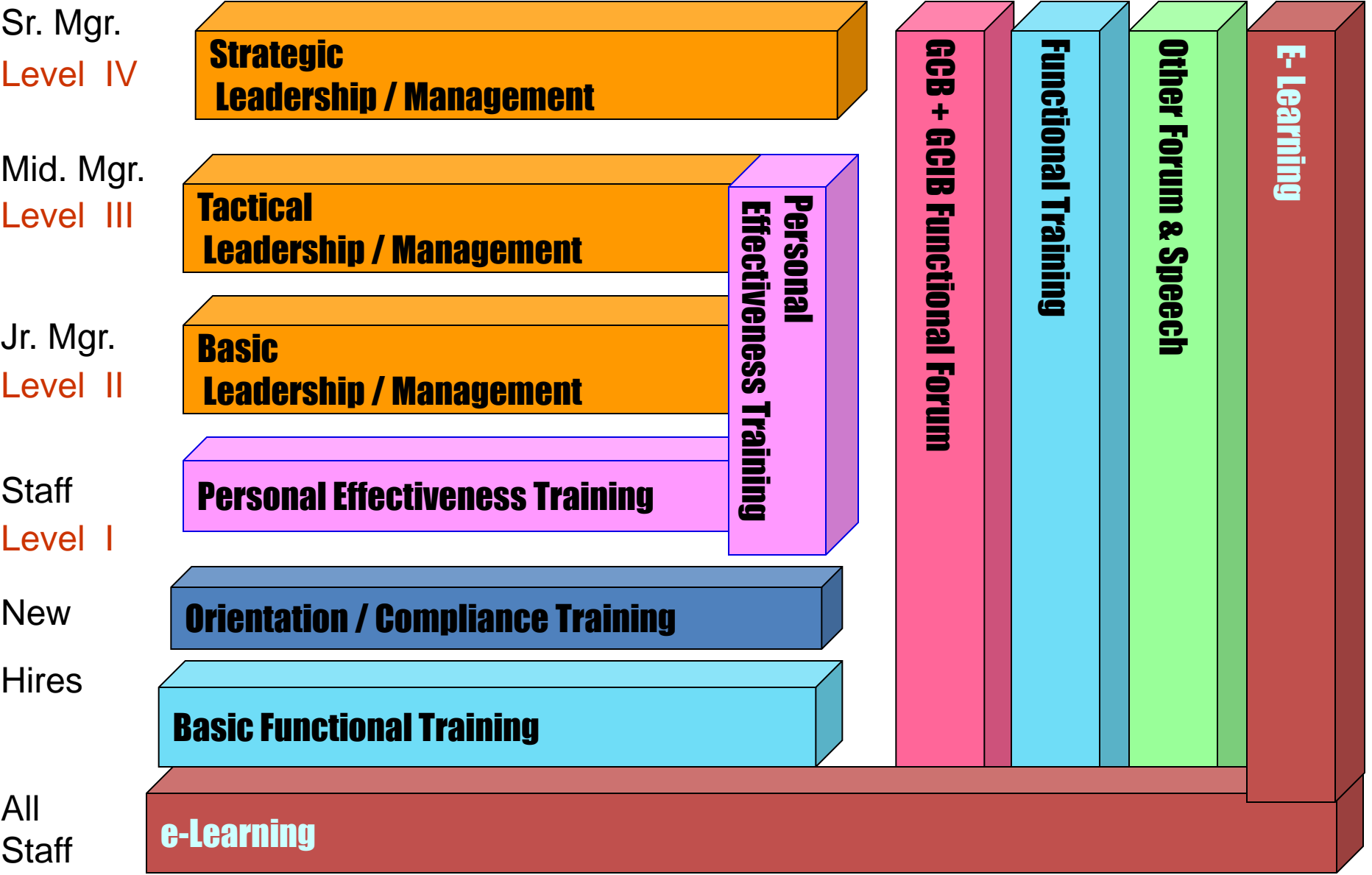
Payroll No.:

Date:

Competency to be strengthened:

Development objective	Desired outcome	Actions	Involvement of others	Deadline	Timetable

Integrated Training



The alignment juggle



Development

Old Approach

- Development just happens

- Development means training

- The unit owns the talent, people don't move across units

- Only poor performers have development needs

- A few lucky people find mentors

New Approach

- Development is woven into the fabric of the organization

- Development primarily means challenging experiences, coaching feedback and mentoring

- The company owns the talent; people move easily around the company

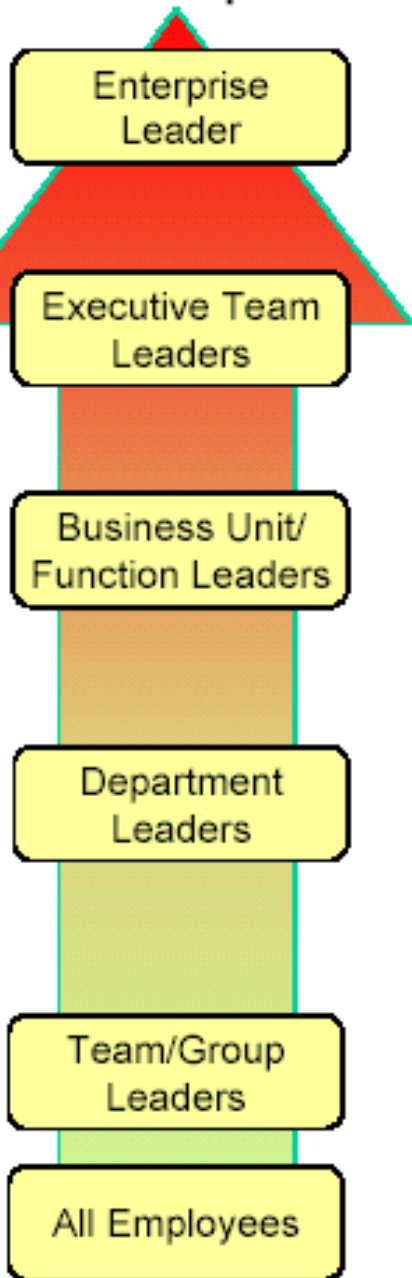
- Everyone has development needs and receives coaching

- Mentors are assigned to every high-potential person

Leadership Level

Requisite Competencies

Leadership Development System



Governance, industry, business-government, national affairs. Wisdom.
Portfolio management; mergers and acquisitions, capital markets. Focusing and prioritization; excellent overall judgment; High-level mentoring and coaching skills. Industry leadership, Business-Government.
Strategic thinking, formulation and deployment in context of global and local PEST environment; career development and succession planning; advanced communications and negotiations. Forming and managing alliances.
Appreciating strategy; aligning departmental vision, mission, structure, systems with strategy. Metrics and measurement. Mentoring and people development. Career management. Team and department performance management. communications. Work-life "balance"
Coaching (visioning, enthusing, encouraging, enabling, empowering); performance management; recruiting and selecting.
Processes, policies, systems. Values. Effective team membership.

<p>↑ <i>Upwardly mobile</i></p> <p>→ <i>In-role or in-level</i></p>
<p>Leadership of "action learning" project assignments. Personal executive coaching. Increased exposure to Board. Involvement in ALL strategic issues. Selective seminars by thought leaders.</p>
<p>↑ Active career management; Strategic Leadership Program. Assignment to mentor. Leadership of "action learning" project assignments. Personal executive coaching.</p>
<p>→ Functional and discipline-based courses and programs.</p>
<p>↑ Active career management. Leadership Program. EMBA or other AMP. Assignment to mentor. Assignment to special projects. Formal "action learning" project assignments. International exposure.</p>
<p>→ Functional and discipline-based courses and programs.</p>
<p>↑ L1 – Leadership Program. Support of personal development plans (education, etc.)</p>
<p>→ Functional and discipline-based courses and programs.</p>
<p>↑ Pre-leadership program</p>
<p>→ Role-related development programs</p>

10 Great Part-Time Assignments

1. Re-launch a product or service that's failing.
2. Launch a new product or service
3. Manage a fix-it/turnaround
4. Manage a rapidly expanding product/ service
5. Prepare & make a strategic proposal to top management
6. Take on an assignment where others have failed
7. Manage a start-up
8. Create a new product/ service from scratch
9. Manage an unpopular change
10. Chair a multi-functional team solving a tough issue

Leadership Developers

Leader Breeders

- Recruit and select high potentials even if they're hard to handle
- Coach for skills development
- Mentor for career development
- Give totally candid feedback on performance
- Create stretch assignments
- Reward and reinforce success
- View failure as a learning opportunity and help their people learn from failure
- Surrender their high performers for corporate challenges and personal development

Leader Blockers

- Recruit and select easy-to-manage people
- Don't coach or mentor effectively
- Lack candor in their feedback
- Fit people to jobs that are inside their comfort zones
- Do not establish stretch goals
- Do not reward differentially for success
- Blame people for failures
- Horde the people who get the job done

Remember

Succession plan may be expected practice – its absence is more a curse than its presence a blessing

Succession program should limit their focus to launch-pin positions – those considered most critical to the organization's need.