SUCCESSION PLANNING THAT WORKS!

With Skye Mercer, MBA, SPHR, SHRM-SCP

HR Consultant & Leadership Coach

www.skyehrconsulting.com
YOUR PARTICIPATION IS WELCOMED

ASK QUESTIONS

USE CHAT FREELY TO COMMENT & SHARE IDEAS

VIDEOS ON – OK EITHER WAY
PLEASE INTRODUCE YOURSELF IN THE CHAT

YOUR NAME

JOB TITLE

ORGANIZATION
WHAT DID YOU IMPLEMENT FROM THE “HOW TO HIRE AND RETAIN QUALITY EMPLOYEES” WORKSHOP?

BONUS ?: HAS ANYONE CONNECTED TO SHARE RESOURCES SINCE WE LAST MET?
NONPROFIT WORKSHOP SERIES: LEADERSHIP, ORGANIZATIONAL CULTURE, AND HUMAN RESOURCES

Module 1
Improving Organizational Culture

Module 2
How to Hire and Retain Quality Employees

Module 3
Succession Planning That Works

Module 4
Creating Workplace Flexibility without Breaking the Bank

March 15
March 29
TODAY
April 26
SUCCESSION PLANNING

• Any leader who is faced with upcoming employee retirements and separations
  • Nonprofit or government leaders
• Any leaders focused on employee or volunteer career development

THIS WORKSHOP IS FOR

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TOOLS FOR TODAY

SLIDES

HANDOUTS

ONLINE RESOURCES AT
WWW.SKYEHRCONSULTING.COM
POLL: Does your organization have a succession plan?
POLL: Does your *department* or you as an *individual* have a succession plan?
WORKSHOP PURPOSE

To give you an easy-to-follow process and resources so you can create an effective succession plan.
Succession Planning: A systemic strategy for building a "pipeline" of qualified people needed to fill future job openings.

Pipeline: 1 or more people who are ready to step into future open position.

Employee Development: (aka career development) Coaching, training, and mentoring employees to prepare them for future open job openings.

Candidate: Person who is qualified and interested in a future position.
SUCCESSION PLANNING

PAST

- Leadership positions only
- Focus on promotions
- "Like me" hiring
- Overly complex
- Manager dictates
- Hidden process

PRESENT

- Positions at all levels of the organization
- Focus on individual career goals
- Focus on diversity, equity, & inclusion
- Complex
- Employee is empowered to lead their own career development
- Open, accessible process

(www.skyehrconsulting.com)
Succession planning is generally a 12+ month continuous process of preparation, not pre-selection.

Succession planning is complex and ongoing.
Why are succession plans a good idea?

- Increases retention
- Identifies skill gaps & training needs
- Retains organizational knowledge

Why else?
Best practices for inclusive succession planning

Create a strategy based on feedback
Equip supervisors to give authentic feedback
Provide anti-bias training
Empower employees
Communicate the “why” and “how” at all levels of the organization
EQUITY, DIVERSITY & INCLUSION

Check with a trusted peer or calibrate as a leadership team to avoid "Like Me" thinking

Ensure equal access to opportunities

Prepare, don't necessarily pre-select (be open to alternative options as they arise)

Seek feedback/diversify decision-making (HR Committee, Board, or trusted peers)

Ensure outside review to avoid unforeseen EEO or AAP risk (employee succession planning)
Comment in the chat:
What “succession planning” practices have worked for you?

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STEPS TO CREATING AN EFFECTIVE SUCCESSION PLAN

1. Identify
   - Feedback + strategy
   - Organizational initiatives
   - # of positions to fill
   - SMARTIE goals

2. Plan
   - Identify potential future roles through employee self-assessment
   - Co-create individual development plans

3. Communicate
   - Seek feedback about the process
     - Strategic, consistent org-wide communication
     - Authentic feedback

4. Evaluate
   - Be open to change based on feedback
   - Create learning opportunities from mistakes

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Questions/
Best Practices
ONE WAY (NOT THE ONLY WAY) IDENTIFY CANDIDATES AND POTENTIAL FUTURE ROLES

FACTORS TO CONSIDER

• Employee’s career goals: What jobs does the employee want and does it exist in the org?

• Current performance: Performing well in their current position

• Growth potential: Interested in and good at learning new skills

• Adaptability to change: Employee and supervisor accept the uncertainty that is inherent to career development
<table>
<thead>
<tr>
<th>Performance</th>
<th>Growth Potential</th>
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<tbody>
<tr>
<td>Low</td>
<td>High Potential</td>
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<tr>
<td>Effective</td>
<td>Medium Potential</td>
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<tr>
<td>High</td>
<td>Low Potential</td>
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**Step 1:** Insert name of internal candidate in appropriate box

**Step 3:** Create individual development plans for each candidate

Adapted from www.shrm.org
GRID FOR DECIDING WHO TO INCLUDE IN YOUR SUCCESSION PLAN

- **Low Performance / High Potential**
  - Seasoned employee capable of expanded role but may be experiencing problems that require coaching and mentoring.

- **Effective Performance / High Potential**
  - Consistently performs well in a variety of assignments; superstar employee. Big picture thinker; problem solver; self motivated.

- **High Performance / High Potential**
  - Does extremely well at current position with potential to do more; give stretch assignments to help prepare for next level.

- **Low Performance / Medium Potential**
  - With coaching, could progress within level; focus on stretch goals for this employee.

- **Effective Performance / Medium Potential**
  - May be considered for bigger role at the same level, but may need coaching in several areas, including people management.

- **High Performance / Medium Potential**
  - Current role may still provide opportunity for growth/development; currently focused on tactical; focus should be on helping improve strategic thinking.

- **Low Performance / Low Potential**
  - May be a candidate for reassignment to a lower level of the organization.

- **Effective Performance / Low Potential**
  - Effective performer but may have reached potential; try to coach employee on developing skills for current role.

- **High Performance / Low Potential**
  - Experienced high performer but has reached limit of employee-career potential. Still a valuable employee and can be encouraged to develop communications and delegation skills.

Adapted from www.shrm.org
Do you have a succession planning success story?
Handout Review

• Planning Questionnaire
• Employee Self-Assessment
• Career Development Plan
• Resources
• What is one idea you plan to implement from today’s session?
THANK YOU!

Questions/Best Practices?

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