
Succession Planning 101

Tips & Tools to Take Action



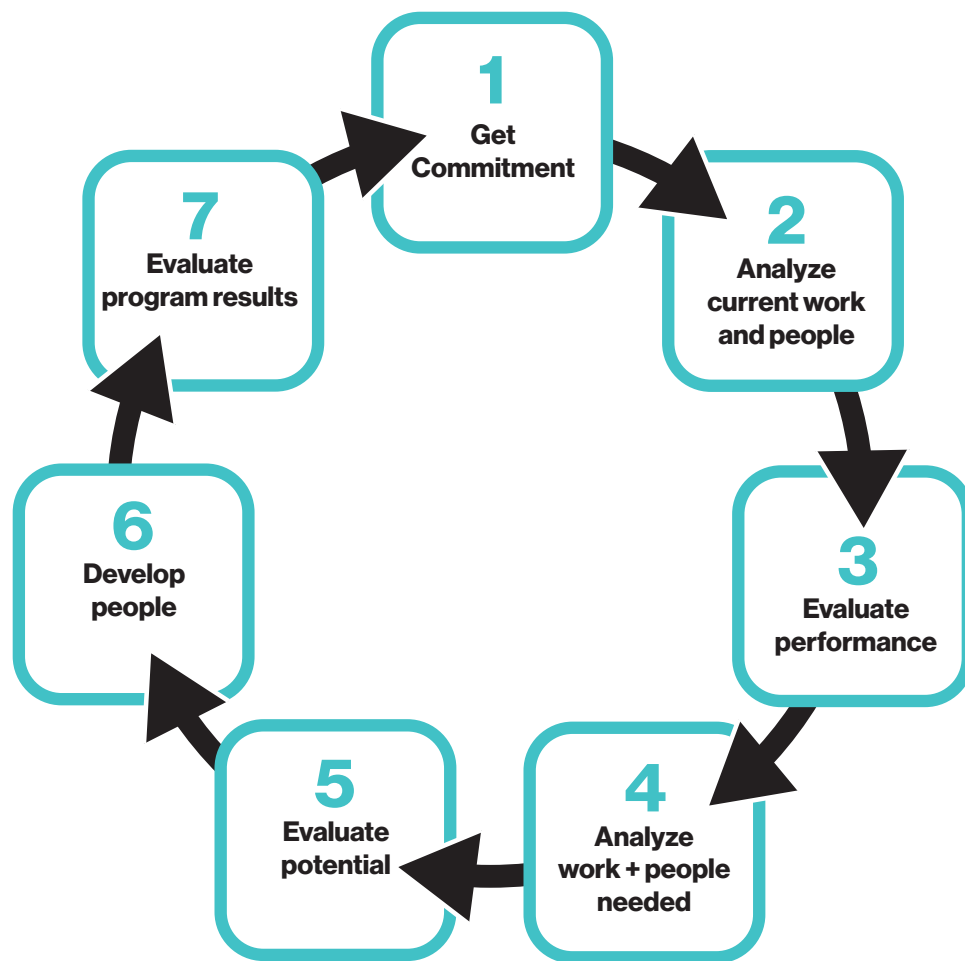
northdakota.dalecarnegie.com



ndminfo@dalecarnegie.com



Process



Used with permission: W. Rothwell, Effective Succession Planning

Supporting Processes

- Performance Management
 - Replacement Planning
 - Talent Management
 - Succession Management
-

Plan Components

Gather the following information before entering into planning discussions to save time and have the appropriate evidence at hand to make sound, objective decisions. Consider that some information needed is at the department, unit or organization level, and some is at the individual level.

- What skills and experience will be needed for a person to take on this role today, and to be successful in it two-to-three years from now?
 - What is the overall strength of current potential candidates to assume this role? (Are there enough potential candidates that will be prepared in time?)
 - Reasons (for example retirement, personal, career path, incompatibility, etc.) that some employees may not be available for this position in the designated time frame.
 - Number of current staff available (that can be job-ready in the designated time frame).
 - Number of future staff available (that can be job-ready with further development and extended time).
 - Assessment of Current Performance and Current Potential (examine performance reviews, 360s, other feedback tools and your Nine Box Grid Assessment).
 - Development opportunities that will need to be made available for internal candidates to be job-ready in the designated time frame.
 - Gaps in the succession plan – areas where it is unlikely we can develop internal candidates in the designated time frame to assume this role, and may need to recruit external candidates.
-

Tips When Succession Planning

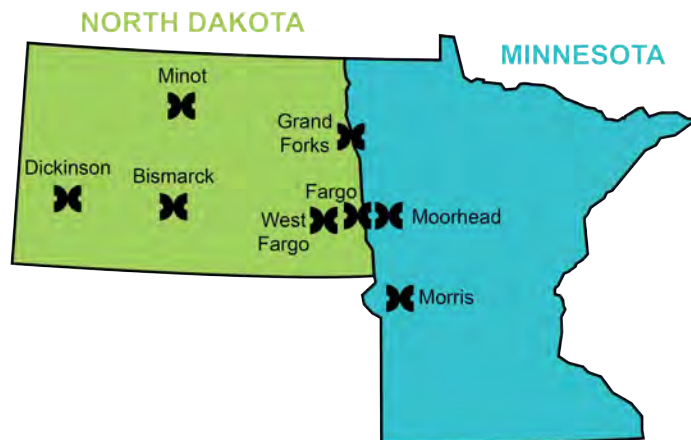
Do	Don't
<ul style="list-style-type: none"> • Develop a strategy and stick to it • Commit the plan to writing • It now – don't wait • Complete it as a team • Communicate its purpose and link it to the organizations vision • Have each leader in your organization develop his or her plan that will feed into the broader plan • Hold leaders accountable for written plans and the implementation of employee development so that individuals are ready when needed • Think broadly for “talent alternatives” and avoid creating an attitude of entitlement where individuals believe they are being groomed for a specific position • When considering internal talent, think across departments, functional lines and geographic locations for people with potential to develop 	<ul style="list-style-type: none"> • Think that you won't need a succession plan. • Assume individuals will buy into the development plans you have for them; include them in the planning process • Rank leaders against each other. When assessing leadership performance and potential, it is all about the individual • Don't offer guarantees or commit to individuals or create attitudes of entitlement so that people believe they are being groomed for specific positions or promotions • Focus development planning for high-potential candidates only • Assume the best source of future talent is “outside” the organization; instead, expand your recruitment strategy internally and externally • Communicate the plan ONCE to leaders and employees in the organization - it needs to be an ongoing message • Put the plan away without revisiting it periodically to see if it is still on target

Enduring History, Transformational Future

Dale Carnegie knows better than anyone that a company can only be successful when the right people are in the right jobs, working together at every level. Hard skills may get someone in the door, but they're only half the story – true excellence comes when your employees marry their education and experience with a mastery of communication and relationships.

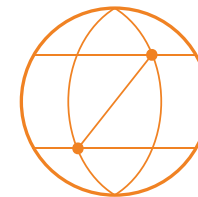
For more than **100 years globally and 20 years locally**, we've helped companies of all sizes generate revenue, increase productivity and reduce costs by revealing their bright and resourceful workforce. Together, we'll set your team in motion and help your entire organization reach new heights, powered by the unique talents of your employees.

- World class local trainer network who undergo a rigorous **certification process**
- Our **time-tested** principles create engaging leaders, powerful presenters, confident sales and service professionals, and empowered organizations
- Dynamic training solutions are offered to the public or customized and delivered for your team across ND and MN. Facilitated in-person, online, or blended.



Dale Carnegie of ND & MN

Bethany Berkeley, CEO/Co-Owner
bethany.berkeley@dalecarnegie.com
northdakota.dalecarnegie.com



701-639-2182