

# **Succession Management/Planning Talent Management**

# Objectives



## Upon completing this workshop you will be able to:

- Utilize a basic framework for building a comprehensive succession plan.
- Understand the need to link talent development with strategic planning and performance evaluation.
- Understand how to assess your organization's succession management positioning.
- Utilize basic analytical tools to identify potential talent threats and vulnerabilities within your organizations.

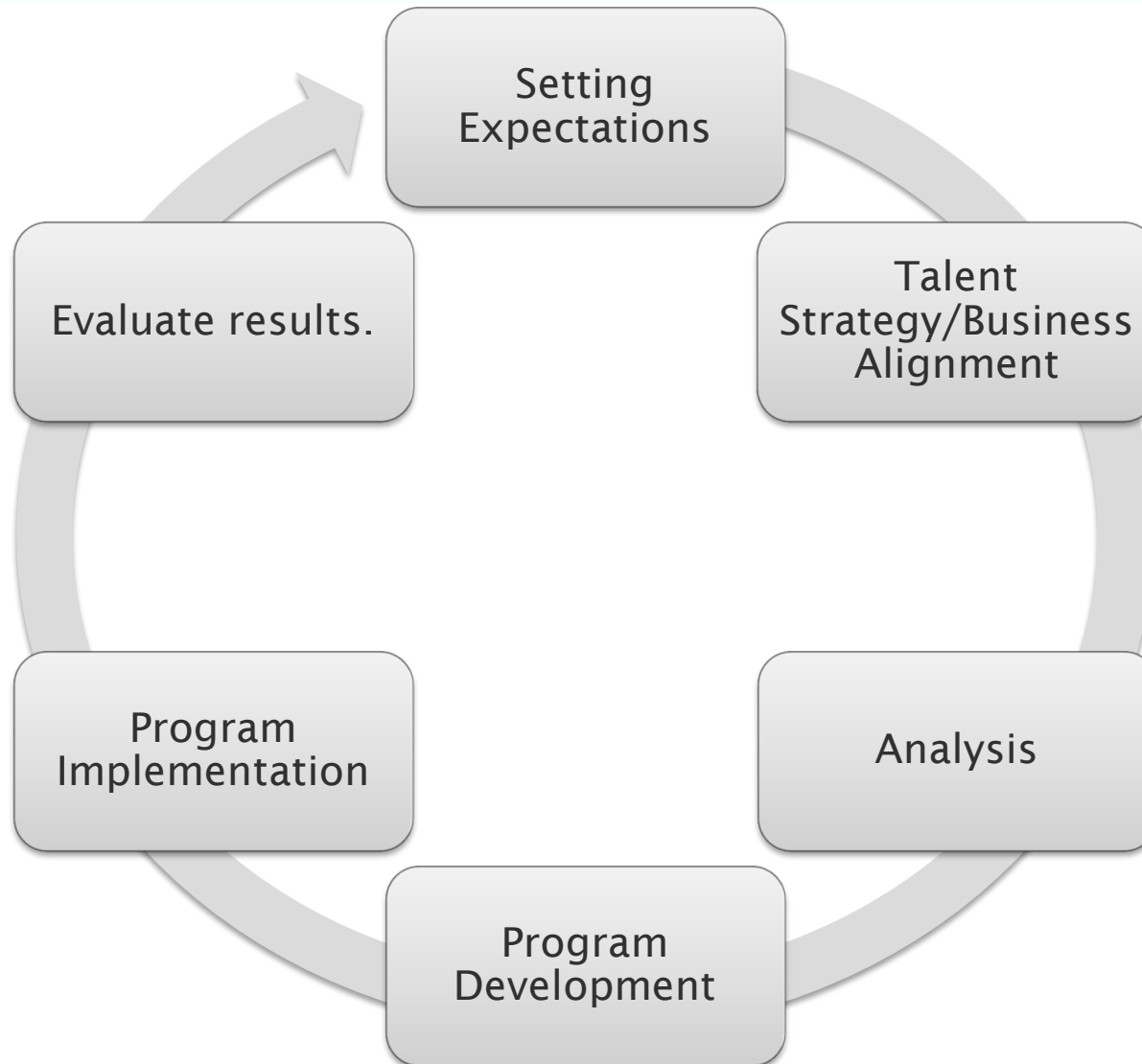
# Succession Management/Planning



## Key Thoughts:

1. Succession management/planning is an element of your overall Talent Management Framework.
2. Succession management/planning is the key to sustainability of organizations.
3. An organization that has not created a comprehensive strategy for addressing succession will be challenged to retain talent in the competitive labor market.

# Succession Planning Cycle



# The Maturity of Your Program



## Transparent Talent Mobility

*Dynamic Process, Highly Transparent, Pool-Based, Talent Movement, Professional and Management Roles*

## Integrated Succession Management

*Business Strategy Alignment, Talent Management Integration, Enterprise Perspective, Owned by CEO*

## Traditional Succession Planning

*Development Plans, Talent Reviews, Business-Unit Focus, Targets Key Positions, HR-Driven*

## Replacement Planning

*List of Senior-Level Positions, List of High Potentials, No Development*

## No Succession Process

*May Include Identification of Successors of Executive-Level Positions*

## **Group Question**

At what stage of succession planning is your utility or organization in right now?

Where do you think your utility or organization needs to be?

# Succession Planning is part of a whole system



Source: Bersin & Associates, 2010.

# Steps to Setting Expectations



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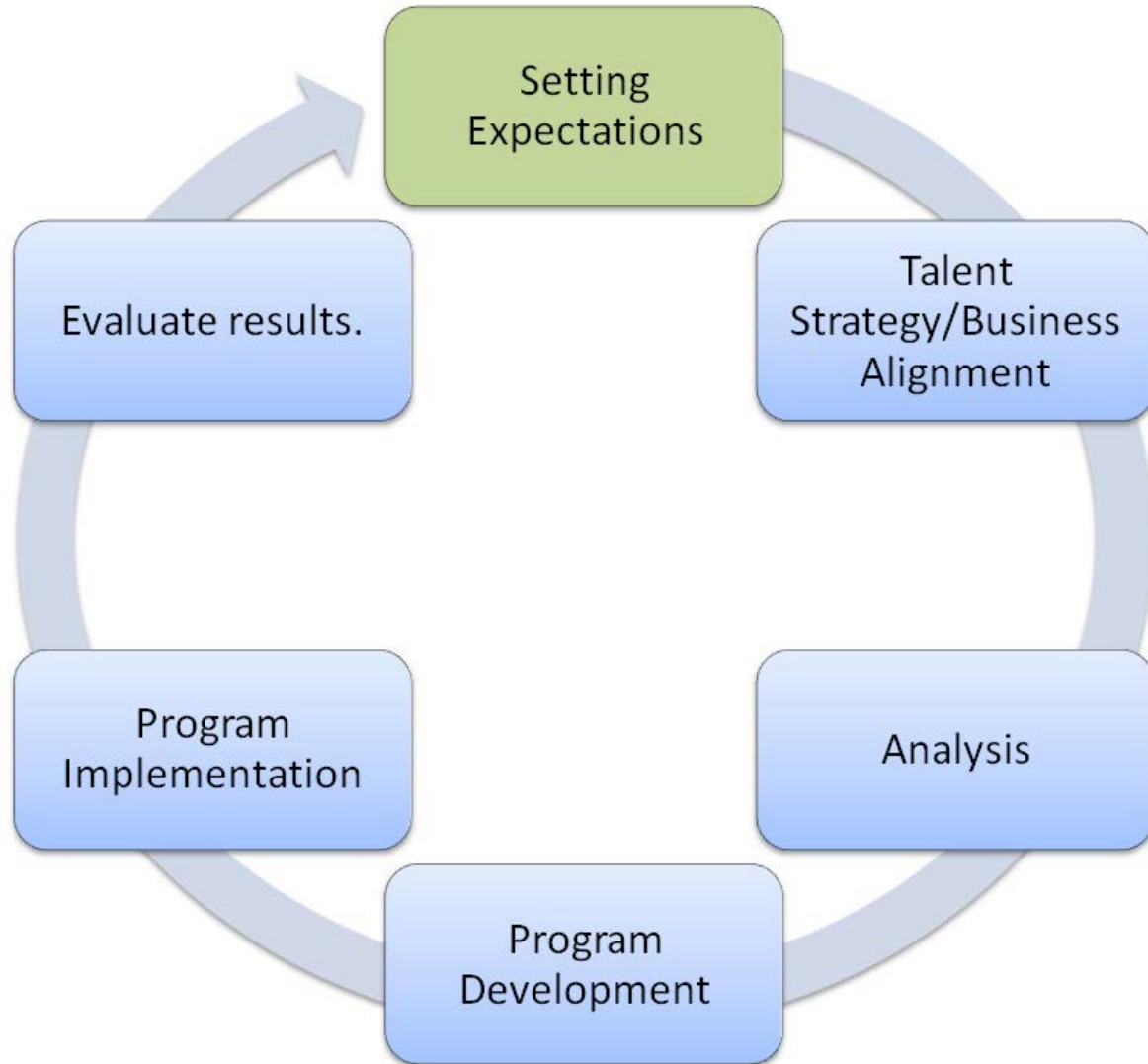
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# Talent Strategy and Business Alignment



## Considerations:

- How does/will your program interface with the following?
  - Engagement Strategy
  - Integration Strategy
  - Talent Systems (Recruitment, Employee Development)
  - Change Management
  - Metric and Measurement Strategy

# Analysis



- Identify anticipated vacancies
- Analyze the work performed
- Identify competencies required
- Review candidate pool for competencies
- Define the gap
- Develop plans to fill the gap
  - Diversity Planning
  - Talent Forecasting
  - Scenario Planning

## Create Alignment

Align these five programs for effective succession planning:

- Talent Acquisition
- Leadership Development
- Career Development
- Performance Management
- Employee Recognition

## Talent Acquisition

- Internal Candidate Pools/Bench Strength
  - Development Programs
  - Monitoring of self-selected high potential employees
- External
  - Recruitment and Selection
  - Employer Brand

## Leadership Development

- Multi-Tiered Training for Leadership
  - Executive Education – strategy focused
  - Middle Tier Programs – system focused
  - Entry Level – people focused
- Assessment and Evaluation
- Action Learning
- Job Rotation
- Coaching and Mentoring

## Career Management

- Skills Assessment and Calibration
- Career Planning and Development
- Professional, Technical, and Management Tracks
- Employee Brand
- Coaching / Mentoring
- Talent Mobility/Transferability

## Performance Management

- Goal Alignment (Cascading: from organizational to individual)
- Skills Gap Analysis
- Coaching and Development
- Bench Strength Assessment

## Reward and Recognition

- One of the greatest risks to any succession program is retention.
- Reward and recognition are not impossible in the civil service environment, it just requires creativity.
- Possibilities:
  - Recognition Programs
  - Benefits Packages
  - Critical Experiences



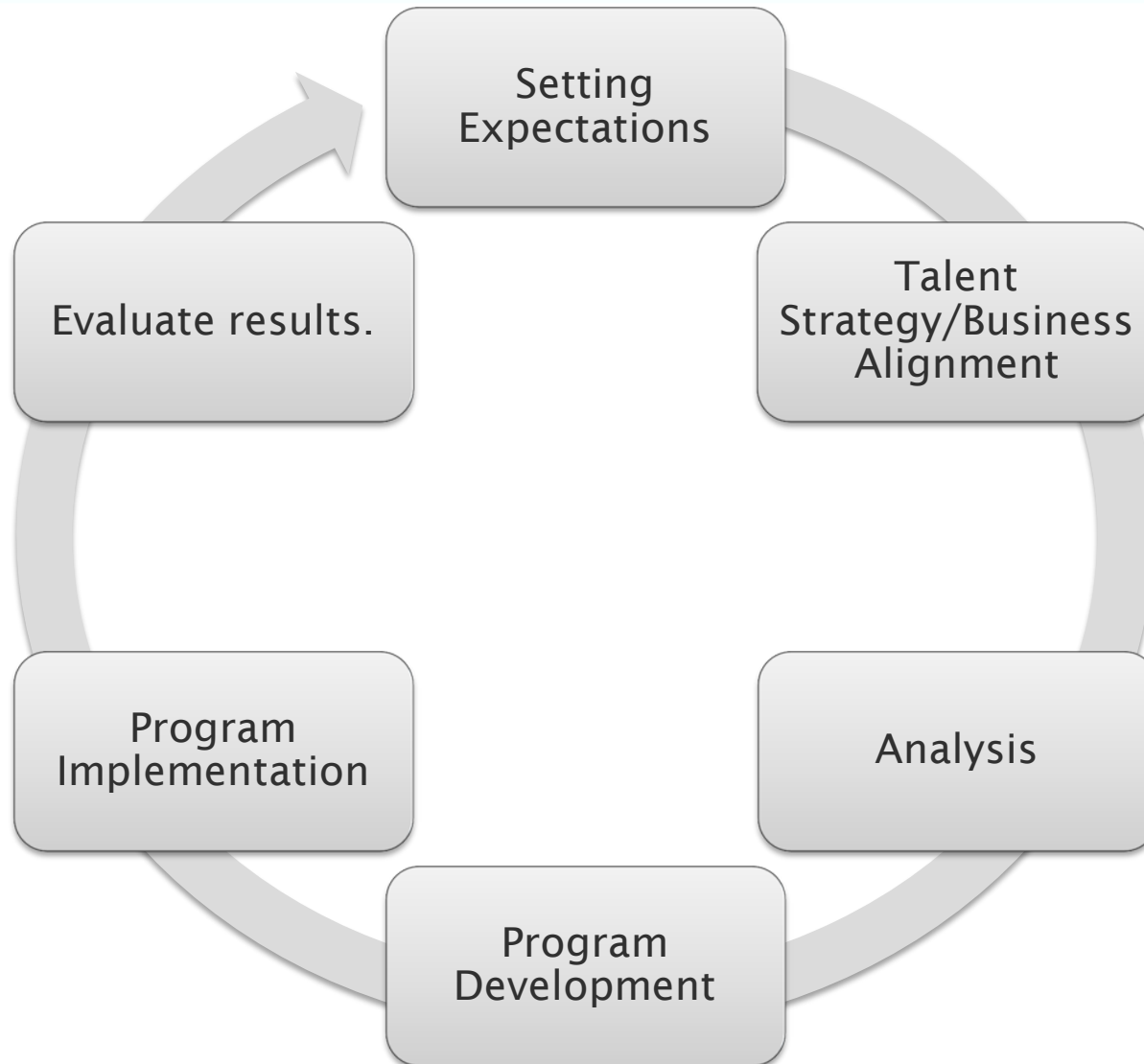
# Evaluating Results



## Considerations:

- Is our program moving us toward our expectations?
- Are our programs aligned to our projected business strategy?
- Is the competency model we are using moving us closer to where we need to be?
- Is our program implementation following our program design (mission creep)?

# Succession Management/Planning Cycle



## **Group Question**

What elements does your organization already have in place and what is still needed to have an integrated succession planning cycle in your utility or organization?

# Examples of programs supporting Succession Management



## EBMUD Programs

- MAST – Leadership Training
- Academies
  - Lead
  - Pathways
  - Management Leadership
- Engineer Rotation Program

# Santa Clara Valley Water District's Model



[Video](#)

The screenshot shows the aqua.gov website with a navigation menu and a main content area. The main content area is titled "Succession Development Initiative" and includes a "Cultivate" graphic with the text "Develop talent • Recognize experience". Below the main content are several sidebar sections: "Program Development", "Coaching", "Resources", "Internships", and "Leadership Development".

**Program Development**

Messages from the CEO

- Action Plan updated status (12/17/13)
- Program announcement (4/9/13)

SCVWD Succession Development Initiative

- Menu of Development Opportunities
- Feedback from staff to Succession Development Video requesting input on program development

Development Conversations

- Development Plan Format
- Sample Development Plan

[Cultivate Video!](#)

**Coaching**

Coaching Tools

- Becoming a Great Coach
- Some Do's for Coaches and Coachees
- Making Coaching Work
- Career Compass Columns on leadership and career development
- 7 habits of highly effective mentors
- 4 Coaching Check-In Questions

Coaching Program

- 2014 Speed Coaching Flyer
- 2014 Coaching Program webinars
- 2013 brochure for Cal-ICMA Coaching Program
- Talent Development Program 2013 Master Calendar
- NextGen Silicon Valley
- Professional Development Opportunities

**Resources**

Coaching Articles

- 4 Coaching Tools
- Eight Mentor
- Six Hidden E Coaching
- How to Be a
- ICMA Launch Gallery
- The Key to E
- Bringing Gui
- Career Com Heroic Lead

**Internships**

Regional Internship Program

- Regional Internship Overview 2013
- Regional Internship Program 2013 Flyer
- Baywork: Bay Area water/wastewater workforce reliability

Summer Intern Program

- Summer Internship Program

**Leadership Development**

Management Talent Exchange Program (MTEP)

- DiscoverMTEP.org

Santa Clara County Leadership Academy

- District employees graduate from 2013 Santa Clara County Leadership Academy

Overcoming Obstacles that Hinder Participation in Leadership Development/Talent Development Tip Sheet for Senior Managers and Aspiring Managers

Sample Performance-Potential Matrix

## Succession DEVELOPMENT vs. Management

- Development conversations and plans
- Rotation Program
- Increased training budget
- Structured Internship Program
- Knowledge Management
- Program Evaluation in December 2014

## **Group Question**

What is one short term and one long term step you can take to implement succession planning in your utility or organization?