

Succession Planning: Preparing Your Department for a Smooth Transition

J. Steven Kalmes CDPT
JSK Transportation Consulting LLC
Eagle River, Alaska
(907) 240-0507
www.jsktransportationconsulting.com



Why You Need Succession Planning

Today's world of work is changing in ways that are affecting organizations more than ever before in history. More and more employees are changing careers and jumping jobs. New generations with different values, behaviors and expectations are reshaping the workplace. Increasing cultural diversity is challenging the way managers manage. As a result, the need for continuous succession planning is greater than ever.



40th Annual Summit: Driving Innovation

What Happens When you Don't Have a Plan

Not having a succession plan in place when you lose key talent, especially if it happens unexpectedly, can cause all kinds of problems.



40th Annual Summit: *Driving Innovation*

What a Succession Plan Can Do for You

A dynamic, updated succession plan does the following:

- Conveys to employees that you have a clear sense of direction and you're supporting it by properly managing our talent.
- Prevents anxiety among employees stemming from concern about direction of the department.
- Ensures that you have talent to deliver the kind of quality services you want to deliver.
- Gives you a vehicle for making sure that critical knowledge is passed on to new people.



40th Annual Summit: *Driving Innovation*

- Helps you identify potential talent throughout your organization.
- Helps people in your department see opportunities for career advancement.
- Helps identify needed training or other kinds of personnel development to maintain the kind of talent you need.
- Helps maintain your organizations reputation, image and credibility.

Taken together, these benefits of an effective succession planning process will help your organization to be more effective and provide quality service to your customers.



40th Annual Summit: *Driving Innovation*

Key Characteristics of a Successful Succession Plan

- It's linked to the organizations overall strategic plan and supported by top level management.
- It's developed by a succession-planning team.
- It's a result of an open planning process.
- It evolves over time.
- It includes strategies for developing talent within the organization.
- It searches for talent both within and outside the organization



40th Annual Summit: *Driving Innovation*

What is the Right Type of Succession Plan for your Organization

- Plans that Deal with Unexpected Departures.
- Plans that Ensure Smooth and Orderly, predictable Transitions.
- Longer Range, Strategic Succession Plans.



40th Annual Summit: *Driving Innovation*

Preparing the Succession Plan

- Establish the Type of Plan
- Build the Succession Planning Team
- Identify Potential Influences on Your Plan
- Identifying Potential Candidate Sources
- Putting it all Together



40th Annual Summit: *Driving Innovation*

Establish the Type of Plan for You Department

- Unexpected Departure
- Planned Transition



40th Annual Summit: *Driving Innovation*

Build the Succession Planning Team

Suggestions for the kinds of people to become members of your succession planning team:

- Select someone who represents or communicates to top level management.
- Put more emphasis on selecting people you know will work effectively together as a team than job titles.
- For unexpected departure plan, make sure to select people who are available for and capable of rapid response.

Establishing an Effective Team Climate

After selecting team member make sure that they agree to and practice behaviors that characterize an effective team climate.

- Focus on the goal of developing an effective plan.
- Everyone respects and trusts each other.
- No one tries to dominate other people.
- Communication is open and widespread.
- Members feel free to express their feelings.
- Team members actively collaborate and help each other.



40th Annual Summit: *Driving Innovation*

40th Annual Summit:
Driving Innovation

Effective Team Climate Cont.

- Team members self-initiate action towards the team's shared purpose, without waiting for someone to direct them.
- Everyone accepts assignments with enthusiasm.
- No one is preoccupied with individual status and position.



40th Annual Summit: *Driving Innovation*

Identifying Potential Candidate Sources

To determine the competencies you need in a candidate for the position you need to fill ask the following questions:

- What kinds of information and expertise should the candidate possess to effectively perform the job?
- What particular skill or set of skills should the candidate possess to effectively perform the job?
- What kind of *natural talents* (behaviors that easily occur without any thought or practice) do you need in a potential candidate?



40th Annual Summit: *Driving Innovation*

Developing a List of Internal Potentials

Look in your own back yard - you may find potential candidates that have the in the right competencies within your organization.

- Post job descriptions.
- Identify qualified people who are ready to be promoted, based on a review of their career paths, training and performance evaluations.
- Identify qualified employees in other departments.
- Referrals from current and former employees.



40th Annual Summit: *Driving Innovation*

Compiling External Sources of Talent

- On line services such a monster.com or websites of professional organizations
- Employment agencies and search firms
- Colleges and universities
- Job fairs



40th Annual Summit: *Driving Innovation*

Training to Develop Needed Talent

- Typically there are competencies that can be further developed with training and coaching to meet the departments needs.
- On- line training programs like the NAPT Professional Development Series
- Local and State Conferences
- NAPT Summit



40th Annual Summit: *Driving Innovation*

Establish the Goals of the Plan

- Putting everything together begins with establishing the goals of the plan. The goals of the plan are a function of the position you need to fill.
- The goal of your plan may be very narrow targeted to a specific position or it may be a multi-goal plan to meet the needs of the department as it moves to accomplish your mission and realize your vision.



40th Annual Summit: *Driving Innovation*

Describing the Process Steps

- Identify which positions need to be filled immediately or in the near future.
- Identify the competencies needed for each position.
- Determine where candidates with needed competencies can be found.
- Interview and assess potential candidates to determine their fit for the needed position or positions.
- Hire and orient the selected candidates.



40th Annual Summit: *Driving Innovation*

Implementing the Succession Plan

- Circulate a formal version of your plan.
- Prepare presentations.



40th Annual Summit: *Driving Innovation*

Position Analysis Tool



40th Annual Summit: *Driving Innovation*