

# Succession Management: Strategic & Practical

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# Approach



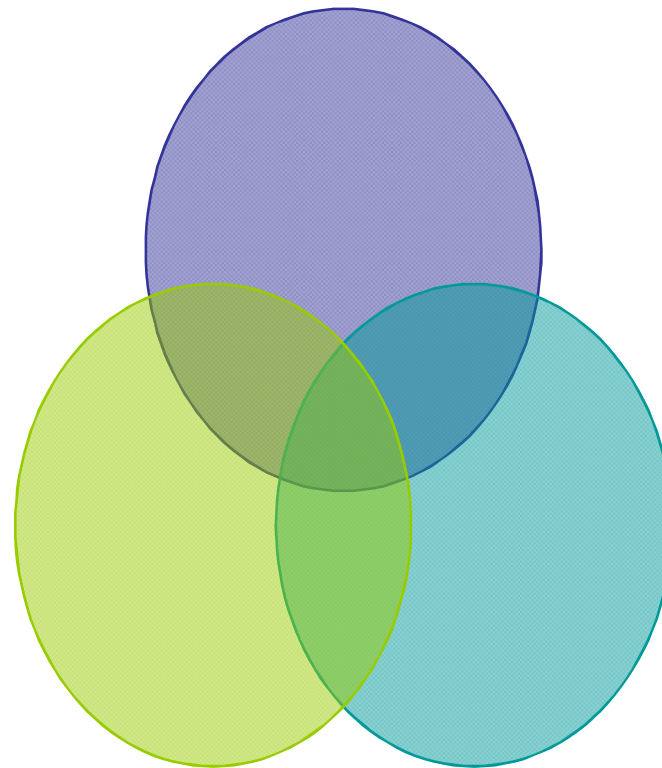
- Strategic:
  - Consider succession management in context of leadership development and staff planning
  - Explore a succession management framework
- Practical:
  - Think of what's critical in the framework
  - Provide you with worksheets to start applying in your environment (on [www.dysartjones.com](http://www.dysartjones.com))
  - Guide you to #1328 on Friday afternoon – Brampton's mentoring manager-in-training programs

# Underlying assumptions

- Libraries are organizations
- Tendency for libraries to hire for current technical/professional skills for a position
- Succession means filling a role for tomorrow within the organization
- Rothwell's *Effective Succession Planning* 2<sup>nd</sup> ed. is seminal text



Strategic planning



Staff planning

Succession planning

## Strategic succession & staffing management

# Succession management program

*“Is a deliberate & systematic effort by an organization to ensure continuity in **key positions, retain and develop** intellectual and knowledge capital for the future, and encourage individual advancement....to insure the identification, development, and long-term retention of talented individuals.”*

Caudron, “Looming Leadership Crisis,” Workforce Sept 1999, pp 72-79

And Rothwell, Effective Succession Planning, p. 29

## Other drivers

- Forms basis for employee career paths
- Clarifies development plans
- Specifies advancement requirements for employees and management
- Reduces talent turnover

# Succession management objectives

- Match the organization's current competencies & capabilities to its future needed competencies & capabilities
- Minimize chaos of replacement planning
- Keep the organization growing & thriving

*“cultivate & manage its leadership, intellectual talent & critically important knowledge assets”*

Rothwell, p 7



# Succession management priority

- For the organization to meet its strategic & operational plans & challenges
  - Leadership determines the strategic success of organizations
  - Good CEO's surround themselves with innovative, intelligent people who balance their strengths & weaknesses

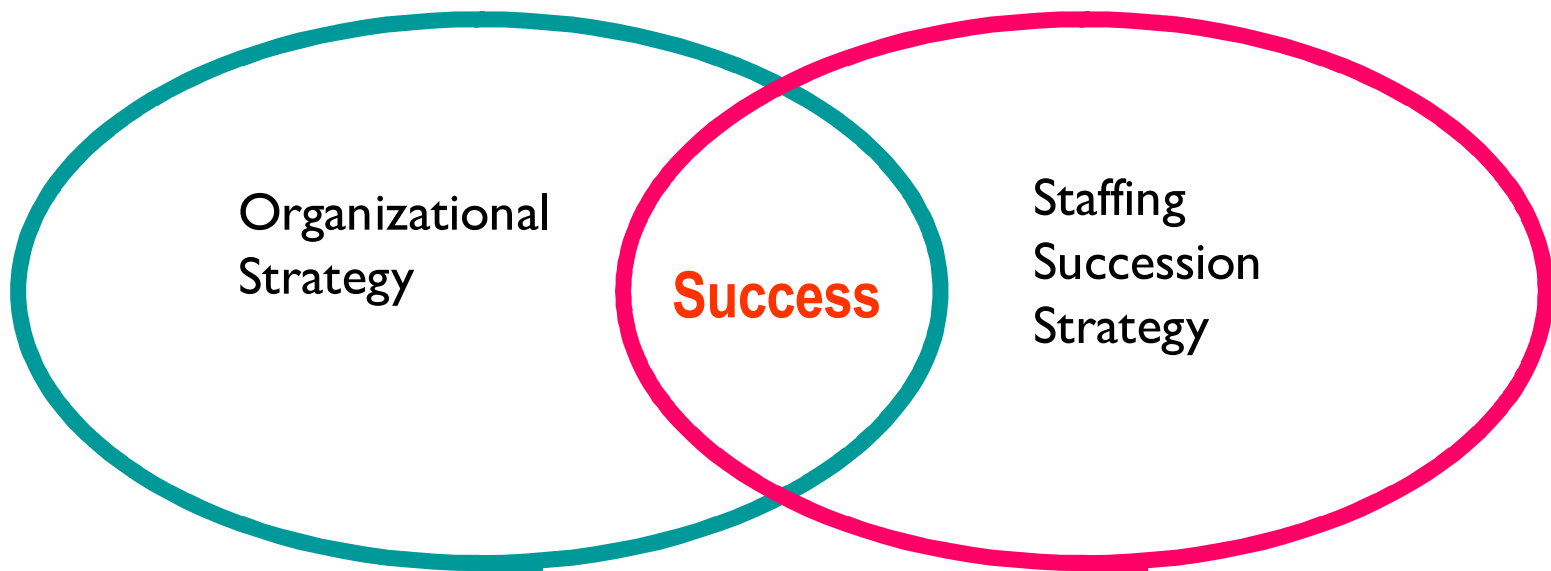
*Research proves the continuity of the organization requires a succession of qualified people to fill key positions*





# Strategic Succession

The library's ability to move forward strategically & successfully is linked to strategic staffing succession





## Succession Planning & Management Program

Rothwell, Effective Succession Planning

# Commit

- Board and Management

*“not for faint-hearted, ill-prepared or uncommitted.”*

Rothwell, p.167

- Set strategies
- Establish program understanding, priority & communication plan
- Determine CEO competencies & select
- Recruit & retain Board members

# Determine future requirements

- What will the environment around the library look like?
- What will the library be doing in 3 – 5 – 10 years?
- What are its strategies?
- What does the library *look* like? It's programs & services?
- What are *staff* doing?
- What **key roles** will be required?
- What *competencies* will be needed?



# Commitment

1. What will it take for our Board & Management to commit to a program? What do they need to know?
2. Who will coordinate or be responsible for the program?

# Determine future requirements

3. What are the library's 3 key strategies for the next 3 – 5 years?
4. What types of roles will be critical to bring these strategies to reality?
5. What competencies will these roles require?

# Assess current situation

- What's our starting point?
- Inventory today's key roles & competencies
  - Keep the target group manageable
- How do these match up with what we need in the future?



# Assess current situation

6. What are our key positions today, and their critical skills?

Key position	Critical skills

7. How well do the current key positions match those we will need in the future?

8. How well do the current competencies match those we will need in the future?

9. How are we developing & retaining strong performers today?



# Appraise Performance

- And just how are we doing?
- How well are people meeting their current job requirements?
- Identify strong performers ....based on current job



# Appraise performance

10. How well are those in key positions performing?

11. How have we identified our strong performers?

# Identify potential

- How do you identify someone's "potential?"
- Establish clear expectations of what you are looking for in future roles
- Review their past performance – what's the pattern?
- Do they seek solutions, or bring problems?
- Are they willing to try new things? Tackle anything?
- What's their follow-thru like?
- Are they a go-to person? Do others like to go to them?

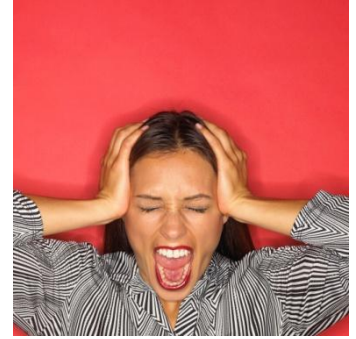


# Identify potential

12. How are we identifying what an employee's "potential" is? How will we know if an employee has strong "potential?" What are the specific competencies, knowledge & behaviours we are seeking for each key position?

# AHAHAHAH!

## Do we really need this?



What problems have occurred in filling key positions in the past 3 – 5 years? (eg. Delays, incumbent doesn't stay more than 6 – 12 mo., etc.)

How long, on average, does it take to fill key positions? Are they ever vacant? If so, for how long?

What strategic directions dose the library want to pursue, but can't because the necessary knowledge & competencies aren't in place?

# Create & implement development program

- Training
  - Within profession as well as with local gov 't, business, etc.
- Mentoring, coaching
- Secondments
- Move people around
- Acknowledge capabilities
- Nurture a development climate

*Promising leaders have to be well-versed in all aspects of the organization*  
*SLA Research*



# Create & implement development program

13. How is our staff development program aligned with our strategic plan, future key positions and needed competencies?

14. What are ways we can support staff in developing their competencies and knowledge for the future?

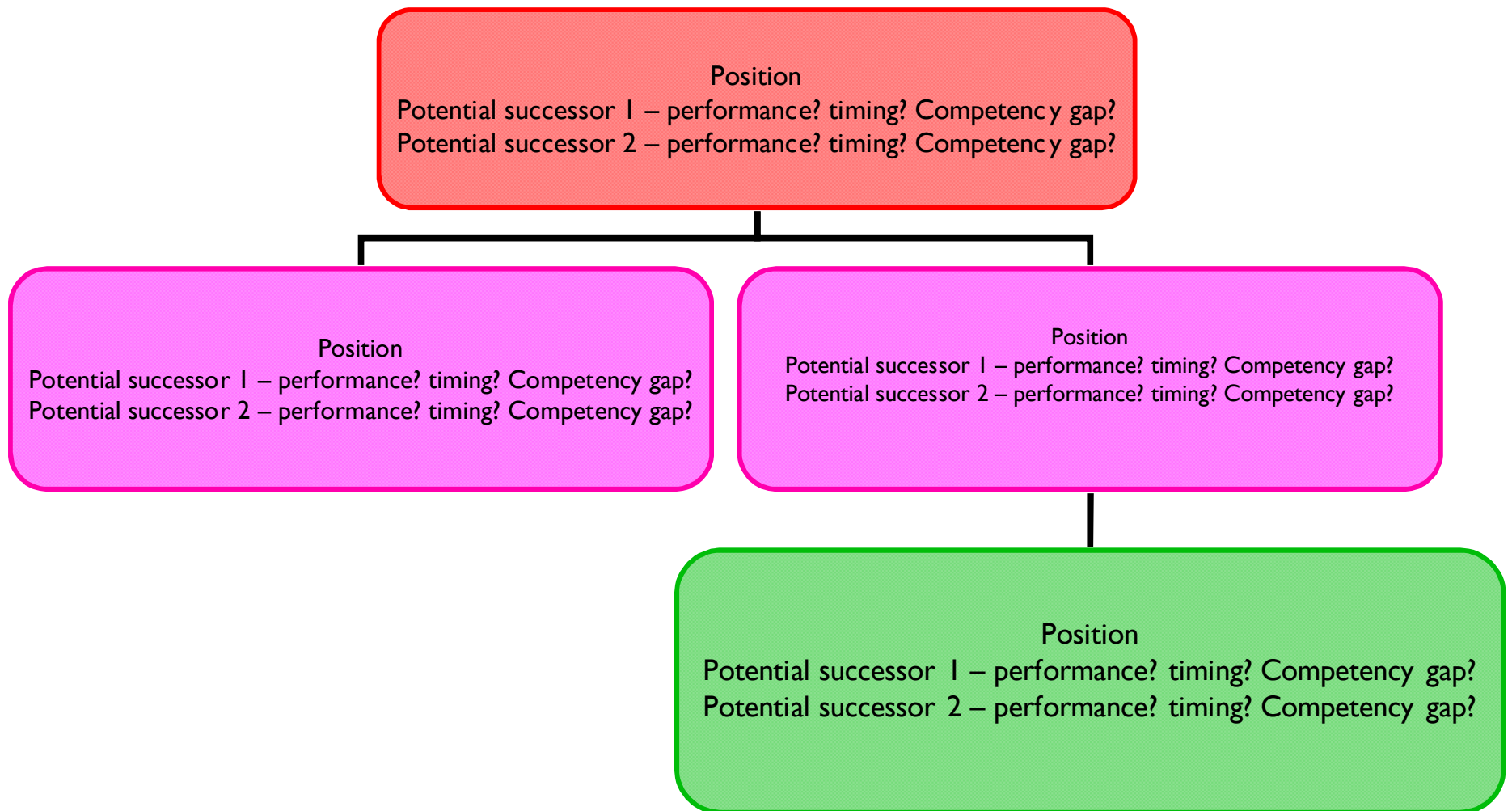
# Recruit, hire, place

- Network to identify potential hires, both within library sphere & beyond
- Consider apprenticeships, staff exchanges
- Be aware of when incumbents may leave positions; use opportunity to restructure role
- How well is library positioned to attract?



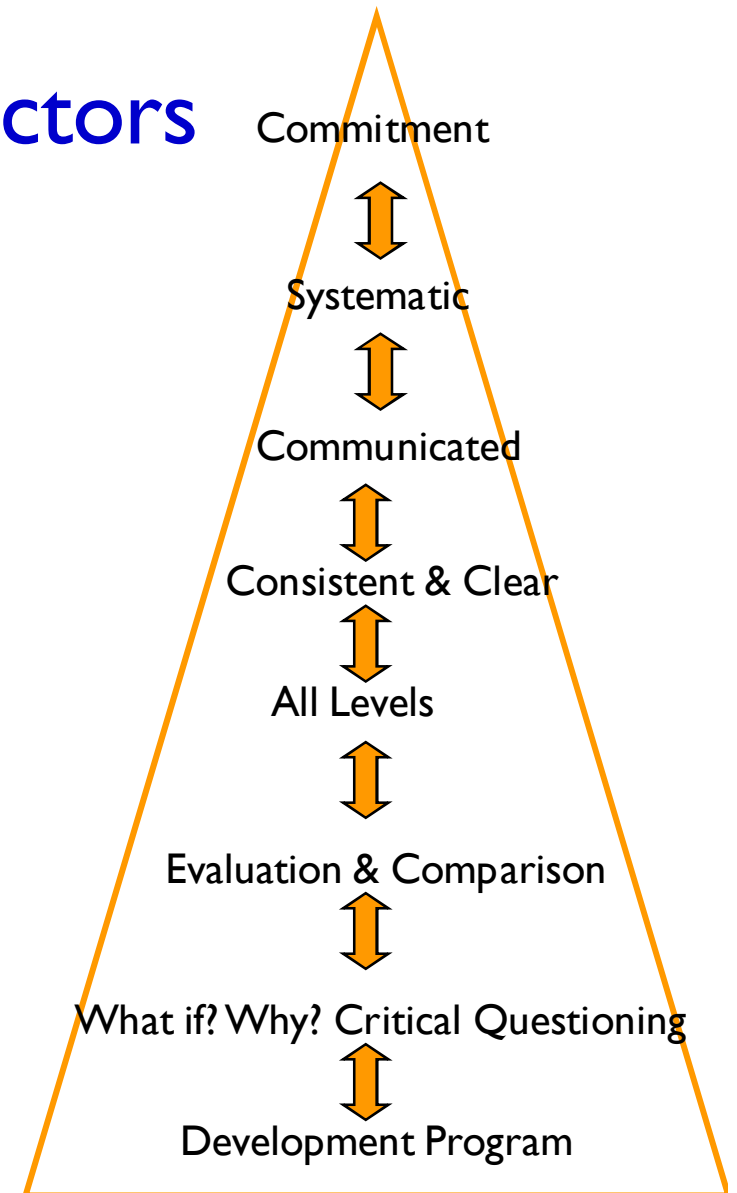


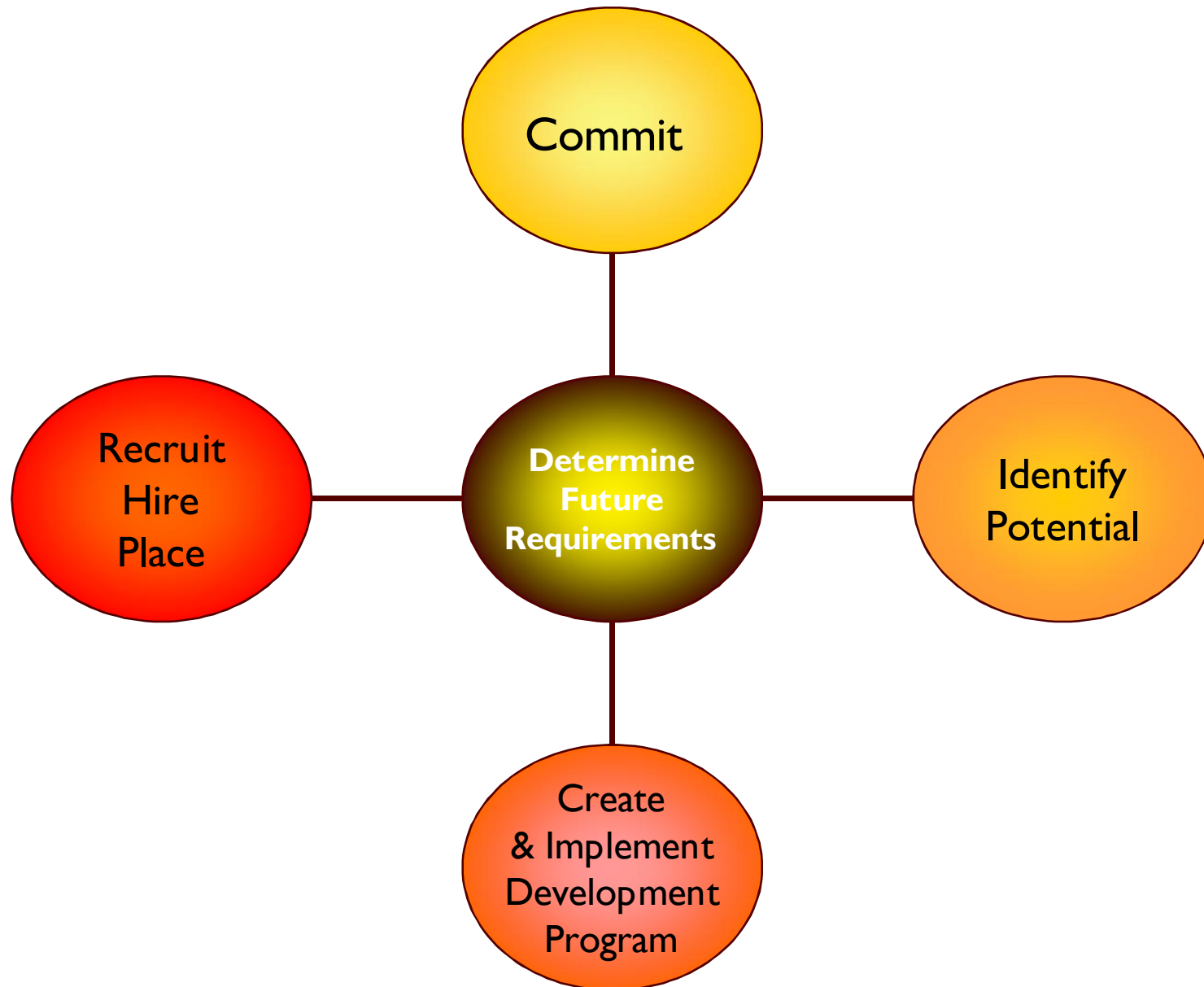
# Basic succession view



# Critical success factors

- Board and management buy-in to systematic approach
- Clear communication plan that fits culture
- Fair, transparent process
- Extends beyond senior management
- Performance, potential & program are evaluated annually
- “Questioning” of ways is encouraged
- Development program
  - Emphasis on mentoring, innovative ways to grow skills, try things & cross-functional or even cross-library moves





Important starting points for discussion

# Using this information

2 things I am going to do with this information, or as a result of our discussions today are:

1.

2.

I'll do this by (date): \_\_\_\_\_

## Preferred sources

- Cohn, Jeffrey, “Growing Talent as if Your Business Depended on It,” Harvard Business Review, October 2005, pp. 62+
- <http://www.lib.uwo.ca/business/leadership.html>, Leadership Guide from Johnson Library at Ivey School of Business, University of Western Ontario
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- Succession Planning Demystified, 2000 <http://www.employment-studies.co.uk/summary/summary.php?id=372&style=print>
- Whitmell, Vicki. Staff Planning in a Time of Demographic Change. Scarecrow Press, 2005