Succession Planning: Pitfalls & Principles
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The right people, with the right skills, in the right place, at the right time

- Strategic workforce planning
- Talent management
- Performance management
- Succession planning

Pitfalls and Principles

<table>
<thead>
<tr>
<th>Common Pitfalls</th>
<th>Success Principles</th>
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<tbody>
<tr>
<td>Misunderstand purpose</td>
<td>Focus on key results</td>
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<tr>
<td>Excessive complexity</td>
<td>Keep it simple</td>
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<tr>
<td>Failure to sustain</td>
<td>Link to something established</td>
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Four Elements of Position Profile
1. Demands
2. Constraints
3. Resources
4. Mitigation Strategies

Succession Planning Three Step Process

Step 1: Identify high risk positions
Step 2: Develop position profiles
Step 3: Monitor mitigation strategies

S.P.O.T.S.
- Succession Plans on Top Shelves

Two Mountains
- First Mountain: Get ahead, achieve, excel
- Second Mountain: Give back, support, enable
Succession Planning: Lessons Learned
Rolando Garza (rgarzabr@gmail.com)

64 million people (40% of the US workforce) will be poised for retirement by 2020

THE MIRROR EFFECT: "You look like me and you act like me; therefore, you would be a good replacement for me."

- Poorly executed succession planning efforts can be a divisive force, starting turf wars and destructive internal horse races.
- For succession planning efforts to get lasting traction, there must be clear, relevant, and timely communications. This includes having tough discussions and answering challenging questions.
- Succession planning is a strategic process and not a mere popularity contest or bureaucratic project.

TRANSPARENCY: The key, missing component of most succession planning initiatives.

HIGH PROFILE POSITIONS IN ANY ORGANIZATIONS (one commonly accepted standard):
- The CEO
- People who report to the CEO
- People who report to people who report to the CEO

WHERE ARE THE MILLENNIALS?
- They currently represent only 17% of the public sector's workforce

7 Most Common Reasons Why Succession Planning Fails
1. Potential successor/s leave
2. Incumbent DOES NOT leave
3. Successor DOES NOT perform
4. Focus on past experience and not on future skills
5. Fixed mindset cripples future success
6. Succession planning is considered an HR function, not a strategic imperative
7. HR & management make succession planning too (BLEEP) complicated

Effective succession management planning involves 3 key factors:
1. Alignment of the plan with current and future organizational needs
2. Understanding of the talent pool in terms of fit throughout the organization (not just leadership positions); and
3. Integration of incoming personnel into well-defined roles and throughout the organization.