

RELINQUISHING THE REIGNS: 5 Strategies for Succession Planning

By Joanne L. Smikle

Smart succession planning not only ensures the smooth flow of an operation, it is also a tool that keeps the best and brightest in the ranks engaged and committed. In this article you'll read about five strategies for skillfully planning to fill key positions as attrition and other inevitable forces of change create vacancies.

The underlying assumption is that the organization's leadership is forward-focused and that no job or position belongs to a single individual. This is an important fact. Many public sector employees attempt to hold jobs for life. While this loyalty is admirable, it does little to cultivate next-level leaders able to position an agency for the future.

Case in point: the citizen housing advocacy arm of a county agency has been headed by the same charismatic curmudgeon for the last 23 years. While Carol is brilliant and nearly obsessive in her commitment to creating housing opportunities for low-income citizens, she is also neither flexible nor forward-thinking. Her team grows weary of her mantra, "That just is not how we do it! Let's stick with what we know works." In addition to this limitation, Carol is rapidly nearing her 80th birthday. When asked when she will retire, she jokes that they will move her out of her position in a body bag. As a result of her believing that her employment is a "til-death-do-us-part" contract, she does little to cultivate next-level leaders prepared for the role.

It is important to examine unspoken beliefs about tenure and ownership when developing a succession planning strategy. Does the organization endorse a 'til-death-do-us-part approach? Is there a belief that tenure in a position should only last long enough for the individual to develop mastery? What is thought of people who make lateral moves for the purpose of learning and growth? These are all questions for exploration.

In addition to examining these beliefs, the organization must also take its own pulse. What data is available regarding the climate

and culture of the organization? This data provides a snapshot of how people think and feel about their employer. Cultivating leaders for the future means developing people able and willing to work to create a healthy organizational culture and climate. Data from climate studies and related audits should be shared with these next-level leaders who are participating in succession planning activities. It will provide them with valuable insights gathered throughout the organization.

The Strategies

The first strategy is to *identify leadership skill sets required for the future—not the past or present*. This is an important first step in the succession planning process. It is critical that you know where the organization is headed and the leadership competencies required for success in environment of the future. Succession planning should be linked to the organization's strategic plan. Leaders of the future should be cultivated based on future needs.

For example, Carol's world of housing advocacy will be very different in the next five to 10 years. The current emphasis from the Department of Housing and Urban Development is on permanent supportive housing. The SROs (single room occupancy) of the past are no longer in vogue. Organizations concerned with housing and homelessness no longer focus on transitional residential placements; instead, the emphasis is on preventing homelessness. These shifts in focus call for a different set of competencies. Those involved with planning for the future of the agency must identify the requisite skill set for what is ahead.

The second strategy is *cultivate leaders from far-flung corners of the organization*. Organizations often draw senior leaders directly from a single core functional area. This was the case with a state highway administration—part of the larger transportation agency. Historically their senior team was comprised of civil engineers, and when a

non-engineer from one of the other modal agencies was tapped to be the deputy administrator she faced an uphill battle. The belief was that because she lacked engineering expertise and knowledge of highways, roads and tunnels, she would be inept in the new role. While she did not enjoy a stellar tenure, it was not because she was not an engineer; she lacked the ability to be decisive and wasted much valuable time analyzing inconsequential issues.

The organization will be enhanced by having a senior leadership team comprised of people representing a wide array of functions and specialties. While it is tempting to believe that the best leaders will come primarily from the core functional areas, that may not be the case. Certainly there is a need for subject matter expertise. But there is also a need for a broader understanding of strategic issues that impact the organization. There is also a need for leaders with the ability to collaborate and communicate effectively.

This second strategy naturally leads us to the third: *seek significant diversity when comprising a leadership team*. Diversity goes well beyond race and gender. It includes diversity of thought, approach and experiences. Diversity also encompasses factors like gender, sexual orientation, religion, level of education, national origin, military service, age and a myriad of other factors. Diversity is not simply a political correct concept. In fact, it is a critical weapon in an organization's arsenal. It broadens the range of options and opportunities available in decision-making because there are more expansive thoughts, experiences and exposures weighing in during the discussions.

The aforementioned highway administration began addressing issues of diversity almost 30 years ago. Their Leadership Development and Career Development Program managers actively recruited people from different levels, regions and backgrounds to be active participants in both programs. This was especially important since program participants were often tapped for middle management and senior leadership positions. As the programs have evolved, the emphasis on diversity has continued to be emphasized. They have also made the conscious effort to recruit young engineers from schools that have higher concentrations of underrepresented populations in their field.

Continuous personal and professional development are critical in the succession planning process. The fourth strategy, *develop comprehensive learning systems*, addresses these imperatives. Whether you are grooming people for middle or senior leadership positions, it is important to build a learning system that enables them to develop the requisite skills to be next-level leaders. The learning systems should focus on building in-depth knowledge of leadership, the core business of the organization and other essential proficiencies unique to the business environment.

The learning systems should not rely solely on didactic classroom instruction. Instead they should allow for collaborative experiences that enable peers to form cohort groups to tackle the organization's problems. These action learning groups enable leaders to build new networks, consider other approaches and enhance organizational effectiveness. Learning systems also should not be a scattered

series of flavor-of-the-month seminars. Instead, they should be well-coordinated growth opportunities designed specifically for a population that will soon be charged with moving the organization into the future.

Another professional development strategy suited to building a cadre of skilled leaders is the formation of facilitated learning circles. These small groups read work from noted scholarly publications concerned with leadership issues, apply the key principles in their areas of the organization and then discuss the applications. This exposes up-and-coming leaders to new theories of leadership, provides them with a framework for applying those theories, and a safe place for processing their application of the concepts.

The fifth strategy is *create "stretch" work experiences*. Whether it is through work details to other agencies or assignments in other parts of the organization, aspiring leaders should have a variety of stretch experiences that expose them to new people, new information and alternative approaches. This provides a broader view of the organization. These leaders will be less likely to return to traditional silos after being exposed to the different parts that comprise the whole.

Stretch experiences should not rely entirely on the existing strengths of the participants. Instead, they should provide opportunities for them to develop new competencies and comfort beyond what is their normal area of proficiency. If a leader is an exceptional financial whiz, their stretch experience should put them in an environment that deals with the human element. Providing a greater breadth and depth of exposure ultimately creates a more knowledgeable leader.

Conclusion

Succession planning cannot be left up to chance. It cannot rely on simply moving an heir apparent into a position. Instead, a broad range of potential candidates must be cultivated using a series of thoughtful interventions. Those interventions should allow them to experience more of the organization, build new relationships and collaborate to solve problems and spawn innovations. Learning is an essential element of the process. Ongoing learning enables future leaders to be well-prepared for their coming roles through exposure to theories and concepts that can enhance the organization.

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