

## Transcription - Case Study: Succession Planning

Welcome back I'm Kim Baillie, she's Fulyana Orsborn, this is inside Exec.

We have a case study for you this week and it's about succession planning. We're going to look at it from a couple of approaches and a bit of a twist to it. So let's have a look at the situation. I manage a team of highly skilled and talented people. I believe succession planning is vital for individual and organizational success. One of my direct reports seems reluctant to participate in both his own preparation for his next career step and finding a successor for himself. He's excellent at his job and a highly valued member of the team. What is the best way to approach?

Well, firstly, I think it's absolutely great.

(Kim) I'd just tell him he's got to do it!

(Fulyana) Don't do that. Don't do that. Well, firstly, I'm delighted that you have this approach to succession planning because it is really vital and it does make a big difference.

And we should never ever have single person dependencies anywhere, because that is where things will fall apart.

I think maybe you want to take a bit of time and dig deeper into why this person is behaving that way. So I can only talk while reading this - I thought of a situation that happened when I was managing a team of people and had something similar to that and what I found, I don't want to make assumptions here, but that's why I'm saying take a bit of time to find out why is that person reluctant, Right? If you are very, very enthusiastic

about helping your people and individuals and teams find their way and find themselves successors so they can grow their career and go to the next level and so on, and so forth. And this way you don't have single person dependencies. So if a person is away or they left suddenly, for whatever reason, the place doesn't fall apart, then you do have someone who can step in, you have procedures in place, you have processes to follow, etcetera.

But what about the person who really is not interested in growing their career? They absolutely love what they're doing and maybe their reluctance and I'm talking about the example I have in my mind, not yours. It's not that they didn't want their staff to grow or anything. They were absolutely fantastic in sharing knowledge and teaching them and all of that. But they had no desire, not ambition, I don't want to say that because that's strong. It's no desire to be the team leader and then the unit manager and so on. They loved what they were doing, they were excellent at it. And so they were the subject matter expert, but they weren't the subject matter expert that kept everything to themselves and hid it so that it wasn't like that at all.

So find out what your person is like and what's their driver. What if they're worried about letting you down and your expectation of them, unless you go to the next level you won't know. I don't want people like that - check that point.

The other point is, are they worried that then if they made a successor, you will move them out of their favorite position and they don't want to.

The answer. There might be in some roles, it's okay to have the person there. As long as you don't stop people from learning that role, you have more than one person that can step in the interim and continuously teach people that role and the procedures, et cetera and so in some cases absolutely fine.

I was very, very lucky when I had people like that, a couple of people that were expert at what they're doing, the team players, they would go out of themselves, out of their way, to help their colleagues within the team and outside the team now and they didn't want to go any further in the traditional sense of climbing up that ladder, that's absolutely fine.

So you might find that it is the case - if you think, no it isn't, you can't have the person staying there, then you will have your reasons and you'll explain them and then you can find room for that person and say, okay, what do you like most about this job?

Maybe there's a similar job that will give them all that satisfaction and growth as well, but don't lose that person just because you haven't looked at their real needs and your needs and the organization needs.

I understand all of that. I think you need to go even more basic. And I think I would recommend that you think about Simon Sinek, find out the why and find out the person's why, what is it that they get out of this job? What is it that they want to give? What is their why for being in this particular role, doing this particular task as well as knowing your own "Why"? In terms of the team and the group and the organization.

The concern I have with succession planning is that they are hard conversations to have because there's so much emotion attached to the idea that there might be change because it's about change. Succession planning is about change, changing the status quo, changing the team dynamic all of those sorts of things.

So they're hard conversations to have. They're not conversations that you should have once, it should be a continuous discussion about what is going to happen and how it's going to happen and has anything changed. So if we're talking about performance review time, then that's the time to talk about succession planning as well. Because it's part of how the performance as a whole is reviewed is that that you've been sharing the information that there is some way of covering your activities when you're not there.

But it's also about these days about if you're the individual who is resisting succession planning. It's about being aware that conditions and situations can change at the drop of a hat. External influences can determine whether it's the organization being taken over, a pandemic, government directive, a new lot of compliance that comes in. Whatever it is, that outside influences can change the way you have to work and what you have to do without you being able to have any control.

So, if you have determined, if we use, for example, that you're in this job, you love it. You don't want to go anywhere else. I don't want to do anything else. You know what you're doing, You're happy to share it all. But this is the peak of your performance in a role. It is here and you've got no alternative.

It's not your plan B it's just there's nothing else that you thought of that you would like to do or you could do or you could do differently to what you do, now. Then you will be caught out simple as that. Because too many times in our careers we have seen an outside influence come in and change the environment completely one day to the next, literally as fast as that. We could be doing this thing one day and then the next day there's no need for that. And so you start to question yourself, your ability and your contribution to the workforce. Aside from all of the other things that keep you working in the first place, the financial stability, the social aspects of work, the challenge that work gives you, all of those things are part of the conversation that you have to have about succession planning.

And my point is that it doesn't have to be hierarchical succession planning. It might be sideways, it might be some other mix of things. But you do need to think about what are the alternatives and not just for you, but for the organization. If you're so good at your job and you're so good for the organization, then you have a feel for the organization and you are concerned for the organization. It is your responsibility to ensure that if you weren't there, that that contribution that you make could be mirrored in some way for the organization's benefit.

We've covered succession planning, we're a bit passionate about it. We believe that passion aside succession planning is an area that we've talked about and we've skirted around, we might look at having a podcast that is very much based on succession planning. And we'll see if we can get a guest in who's dealt with different situations that can talk to us about

how we approach these different ways of succession planning these days, in this environment that we are in.

We'll leave it there for today. I'm Kim Baillie she's Fulyana Orsborn, This is Inside Exec.