



S U C C E S S P R O F I L E S

A Practical Succession Planning Workshop
March 26, 2026 | 8am-12pm, CST
Facilitated by Tanya Zion



CAPABILITIES

WHAT I DO

Develop & Deploy a Vision: long-term vision linked to company strategy; align structure, people, and processes to execute

Achieve Through People: allocate and prioritize work; recruit and develop the right skills; develop future leaders; actively coach; communicate effectively; collaborate across the Leadership Team

Drive Performance: develop challenging performance targets; hold people accountable; develop plans for sustainable value; drive results

Lead Change & Engagement: build the business case for change; build an engaged, agile organization; lead change with clarity and conviction; foster a culture of improvement

Relationships & Partnerships: keep the organization and members/clients informed; work across cultures; build strategic external partnerships

EXPERIENCE

WHAT I'VE DONE

Functions: worked within or managed different functions; demonstrated technical excellence; commitment to continuous learning

Accountability & Delivery: met challenging targets and budgets; led change; led cross-functional groups; effective project management

Internal & External Organization: effective with external members/clients; involved in the community

PERSONAL ATTRIBUTES

WHO I AM

Emotional Intelligence: connect across all levels; create environments of open discussion; balance humility and confidence

Professional Disposition: approachable; builds trust; acts as a role model; customer focused

Drive to Achieve: challenges self and department toward higher performance; anticipates the environment; sees the big picture

Ownership & Integrity: takes responsibility for organizational performance; publicly supports company decisions; creates accountability at all levels

KNOWLEDGE

WHAT I KNOW

The Organization: how our organization delivers value and makes money; cross-functional resources; broader performance

Key Business Processes: strategic planning; financial planning; org planning; operations; process improvement; employment policies

The World Outside Our Organization: the business community served; competitors and their impact; regulatory environment; industry trends

CAPABILITIES

WHAT I DO

Develop & Deploy a Vision: translate business objectives into action plans; demonstrate how role impacts the greater organization

Achieve Through People: allocate and prioritize work; listen and accept feedback; coach and support others; develop skills in others

Drive Performance: develop challenging performance targets; hold people accountable; drive process improvement; take action

Lead Change & Engagement: lead change with conviction and clarity; foster a culture of improvement; ensure people feel valued; celebrate success

Relationships & Partnerships: keep supervisor, employees, and members/clients informed; work across cultures; demonstrate respect

EXPERIENCE

WHAT I'VE DONE

Functions: worked within and understood different functions; demonstrated technical-professional competency; committed to learning

Accountability & Delivery: met challenging targets; led change; managed people; led cross-functional teams; effective project management

Internal & External Organization: effective working relationships with peers; effective with members/clients; involved in the business community

PERSONAL ATTRIBUTES

WHO I AM

Emotional Intelligence: develop accurate self-picture through reflection; recognize impact as a manager; balance humility and confidence

Professional Disposition: maintains resilience and positive attitude; builds trust; takes a proactive, win/win approach; customer focused

Drive to Achieve: demonstrates high energy toward goals; identifies opportunities for process improvement

Ownership & Integrity: supports company decisions; takes personal responsibility for self and team; faces difficult conversations honestly; does the right thing when no one is watching; trustworthy

KNOWLEDGE

WHAT I KNOW

The Organization: how our organization delivers value and makes money; cross-functional resources; broader performance

Key Business Processes: technology that supports processes; processes in own area and their effects; annual budgeting and cost control

The World Outside Our Organization: business community served; competitors; changing regulatory landscape



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SUCCESS PROFILE

INDIVIDUAL CONTRIBUTOR LEVEL

CAPABILITIES

WHAT I DO

Develop & Deploy a Vision: develop personal objectives linked to company goals; understand how role impacts the greater organization

Achieve Through People: work well as part of a team; coach and support others; influence and communicate effectively

Drive Performance: constantly develop own performance; prioritize demands; achieve excellence in role; take action to drive results

Lead Change & Engagement: embrace change; foster process improvement; challenge the status quo

Relationships & Partnerships: keep supervisors, peers, and members/clients informed; demonstrate respect; work across cultures

EXPERIENCE

WHAT I'VE DONE

Functions: worked within and understood different functions; performed similar role; demonstrated technical competency; problem-solving

Accountability & Delivery: created open, collaborative environment; met challenging objectives; supported change

Internal & External Organization: effective working relationships with peers; effective with members/clients

PERSONAL ATTRIBUTES

WHO I AM

Emotional Intelligence: develop accurate self-picture through reflection; balance humility and confidence; demonstrate interpersonal sensitivity

Professional Disposition: behaves professionally under stress; takes proactive approach; maintains productive relationships; champions the company

Drive to Achieve: proactively learns and develops self; learns from mistakes; works effectively across departments

Ownership & Integrity: takes personal responsibility; faces difficult conversations honestly; does the right thing when no one is watching; trustworthy

KNOWLEDGE

WHAT I KNOW

The Organization: knows impact of role on financial performance; knows org structure, products, services; knows management team

Key Business Processes: uses technology to support processes; understands processes in own area and their effects; employment policies

The World Outside Our Organization: familiar with the business community served



SUPPORTING ORGANIZATIONS THROUGHOUT THE WORKFORCE CYCLE

