



STRUCTURED. STRATEGIC.
ACTIONABLE.

Before We Get Started

STAY CONNECTED

- Chat with attendees anytime
- _____ is your online host

NEED HELP?

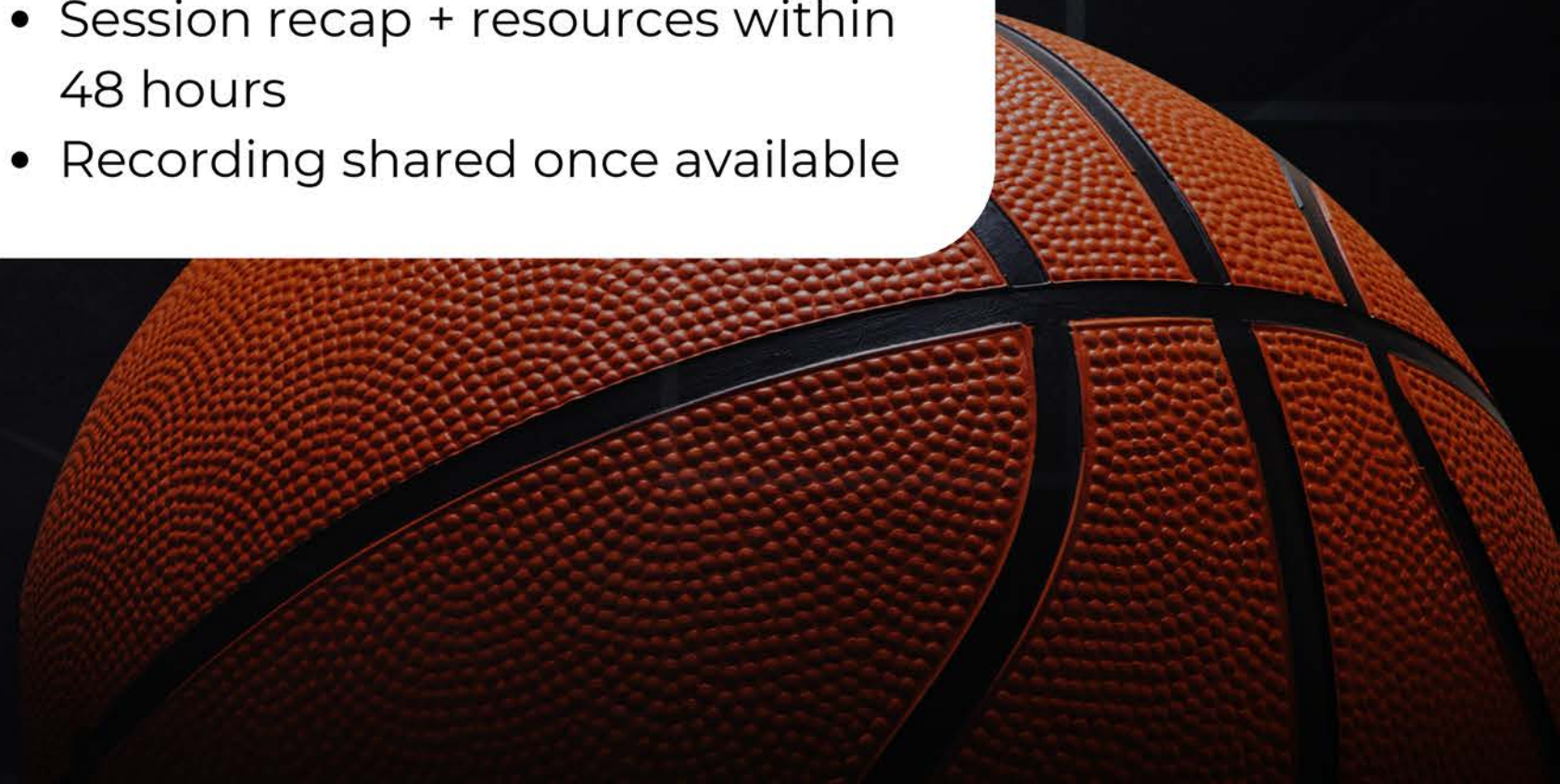
- Private chat Daniel (Producer)
- Or call: 314-754-0236

ASK QUESTIONS

- Q&A open throughout
- **Virtual:** Use Q&A feature
- **In-person:** Raise hand

AFTER THE SESSION

- Session recap + resources within 48 hours
- Recording shared once available



Structured. Strategic. Actionable.

Welcome To Succession Madness

Through a working session, we'll be sharing
practical framework for leadership continuity





Block One: Welcome and Orientation

Let's Be Honest

Most organizations wait too long
Succession becomes urgent instead of strategic
Risk compounds quietly
Then something breaks



What To Expect Today



What This Isn't

- Not picking favorites
- Not secret promotion decisions
- Not replacing people behind their backs
- Not a once-a-year HR document



What This Is

- Identify high-impact roles
- Define success clearly
- Assess readiness honestly
- Develop intentionally
- Reduce risk

Today's Session Outcomes

What You'll Walk Away With

One critical role identified

Success Profile built

Talent assessed

Gaps identified

Development path drafted

Next steps defined



How We'll Move Through The Workshop

Session Flow

Clarify
Scope

Identify
Critical
Roles

Define
Success

Assess
Talent

Identify
Gaps

Build
Plans

Plan
Scenarios

Communi-
cate and
Sustain

Mindset Matters

Ground Rules

Think in roles,
not personalities



Stay strategic



Be realistic



Focus on one role



Participate fully



Meet and Greet

Tell Us About Yourself

Name

Organization

One leadership risk you are concerned about

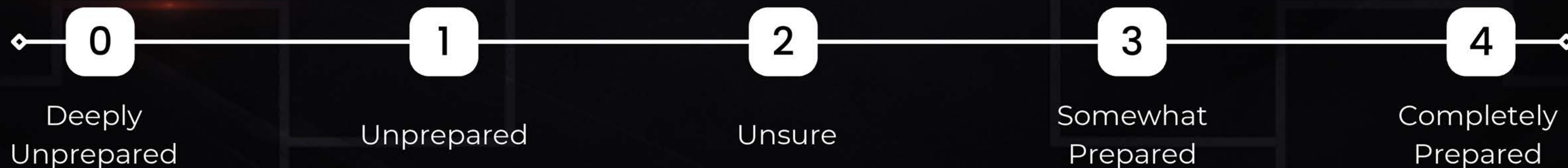
Favorite sports ball team



Let's Reflect

Poll #1

If a key leader resigned tomorrow, how prepared are you?



Gartner Pervasive Integration Maturity Model

Getting Started

Ad-hoc

- Largely ignored
- No competency
- No methodology
- Casual sourcing
- Duplicated efforts

Enlightened

- Problem identified
- No responsible party
- Word-of-mouth best practices
- Approved, support tools, per macro area sourcing
- Users help identify needs

Standardization

Systematic

- Recognized discipline
- Integration competency center(s) exist
- Formalized best practices and governance
- Formalized sourcing policy
- Users submit project requests

Bimodal (Systematic + Adaptive)

- Integration as digital business enabler
- Integration strategy group/single ICC
- Support for adaptive requirements
- Shared HIP in place
- Differentiated sourcing policies
- Users offered facilitation

Staying on Top

Plug-and-play

- Integration embedded into the digital culture
- Enabled, facilitated and encouraged DIY integration
- Shared, centrally managed and self-service HIP
- DIY facilitation team in place
- Users encouraged to tackle integration directly; seek help as needed



Block Two: Clarify Scope & Identify Critical Roles

Clarify Scope

- What are we solving for?
- Whole organization or select roles?
- Risk mitigation or growth?
- Short-term or long-term continuity?



Block Two: Clarify Scope & Identify Critical Roles

Decide Your Focus

- Entire organization
- A division
- Executive team
- High-impact roles only

What are you primarily solving for?

Poll #2

0

*Risk Mitigation
(Backfill Critical Roles)*

1

*Growth
Readiness*

2

*Board
Requirement*

3

All of the Above

4

Not Sure



Considerations



Critical Roles

- Create disruption if vacant
- Hold institutional knowledge
- Impact revenue or compliance
- Maintain key relationships



The Disruption Test

- What breaks if this role disappears?
- How long could we function?
- Who would step in?



What This Isn't

- Single incumbent
- Long tenure, no cross-training
- Retirement cluster
- No documentation



ACTIVITY

Select One Role



Choose one critical role.
Apply the disruption test.
Confirm it creates real risk.

Block Two: Clarify Scope & Identify Critical Roles

Organizational Development vs Succession

Organizational Development

Is the structure right?

Succession Planning

Who fills the role?

How prepared are they?

Block Three: Define What Success Looks Like

Define the Seat

- Separate the role from the incumbent
- Define outcomes, not tasks
- Clarify what great looks like



Block Three: Define What Success Looks Like

Build the Success Profile

- Core outcomes
- Required skills
- Required experience
- Critical behaviors
- Leadership capabilities

LEADERSHIP SUCCESS PROFILE

What I Know

Capabilities

Develop & Deploy a Vision
Achieve Through People
Drive Performance
Lead Change & Engagement
Relationships & Partnerships

What I've Done

Experience

Functions
Accountability & Delivery
Internal & External Organization

Who I Am

Personal Attributes

Emotional Intelligence
Professional Disposition
Drive to Achieve
Ownership & Integrity

What I Know

Knowledge

The Organization
Key Business Processes & Systems
The World Outside of the Businesses



Block Three: Define What Success Looks Like

Future-Proof the Role

- Strategy shifts
- Technology evolution
- Market changes
- Leadership expansion



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Draft Profile



Define current success.
Add 2–5 year competencies.
Clarify non-negotiables.

Q1 Timeout

Meet Us Back on the Court in 15 Minutes





Block Four: Assess Current Talent

Assess Against the Profile

- Performance
- Potential
- Readiness
- Risk

What To Expect Today



Readiness Categories

Ready Now

1-2 Years

3-5 Years

Not Currently Viable



Motivation Matters

Not everyone wants leadership

Verify interest



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Map Your Bench



Identify successors.
Assign readiness.
Note risk factors.

The biggest gaps you identified are primarily ...

Poll #3



Block Five: Identify Gaps

Gap Clarity

Is this an **organizational** gap?
Is this a **talent** gap

Define Gaps Specifically

Avoid vague statements.
Define exact missing skill or experience.



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Identify Gaps



Identify 1–3 real gaps per candidate.



Block Six: Create Development Plans

Targeted Development

- Stretch assignments
- Cross-functional exposure
- Mentoring
- Coaching
- Training



Block Six: Create Development Plans

Build a 6–12 Month Plan

- Specific action
- Timeline
- Accountability
- Measurement

**If this role were vacant tomorrow,
how confident are you in the first 30
days?**

Poll #4





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Draft Plan



Build one targeted development plan.

Q2 Timeout

Meet Us Back on the Court in 15 Minutes





Block Seven: Plan for Multiple Scenarios

Emergency vs Planned Transition

- Specific action
- Timeline
- Accountability
- Measurement



Block Seven: Plan for Multiple Scenarios

Knowledge Transfer Risk

- Documentation
- Client relationships
- System access



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Scenario Map



Define emergency coverage.
Define long-term path.



Block Eight: Communicate Appropriately

Intentional Communication

Balance transparency and discretion.



Block Eight: Communicate Appropriately

Conversation Framework

- Acknowledge performance
- Clarify expectations
- Outline development path



Block Eight: Communicate Appropriately

When Someone Is Not Selected

- Affirm value
- Clarify criteria
- Offer growth

Compared to the start of today, how has your confidence in succession planning changed?

Poll #5

0

Significantly improved

1

Somewhat Improved

2

About the Same

3

*Less Confident
(Realized Gaps)*

4

*Calling in
Reinforcements*



Block Nine: Review and Sustain

Not a One-Time Event

- People change
- Strategy shifts
- Risk evolves



Block Nine: Review and Sustain

Review Cadence

- Annual review
- Mid-year risk check



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Review Cadence

- Annual review
- Mid-year risk check



30-60-90 Roadmap



Clarify Scope

Identify
Critical Roles

Define Success

Assess Talent

Identify Gaps

Build Plans

Plan Scenarios

Communicate
and Sustain



Final Commitment

- One decision you will make
- One conversation you will have



THANK YOU



**YOUR FEEDBACK
IS IMPORTANT!**

*Please take a few moments to
complete our feedback survey!*

In-Person Credits

Program Title:
Succession Madness:
Building a Championship Bench
IN PERSON

Credit Hours :
3.5

SHRM:
26-G2D9R

HRCI:
737023

Live Online Credits

Program Title:
Succession Madness:
Building a Championship Bench
LIVE ONLINE

Credit Hours :
3.5

SHRM:
26-M6PCF

HRCI:
737029