SUCCESSION PLANNING & TALENT MANAGEMENT

Overview

Succession planning is a process for identifying and developing new leaders who can replace other leaders when they are promoted, leave, retire, or otherwise become unable to continue in their current role. Succession planning increases the availability of experienced and capable employees that are prepared to assume these roles as they become available. Succession planning enables the organization to plan for changes in personnel for seamless transitions. Talent management helps retain and develop the key talents that the organization needs to be successful.

Succession planning and talent management are future-focused activities that look out many years to identify, develop, prepare, and eventually assist the right talent for the right positions. Talent management is a strategy for identifying and developing future leaders in an organization — not just at the top, but also for major roles and key positions at all organizational levels. Succession planning helps the organization prepare for all contingencies by preparing high-potential employees for advancement.

The purpose of this module is to help the learner understand talent management and use the skills to build an actionable succession plan for their organization.

Learners

This module is designed for leaders who are either revising an existing succession plan for their organization or who desire to create a new succession plan for their organization.

The module may qualify for Continuing Education Units (CEU) for professional certifications depending on the professional association.

Module Authors

The author for this module is Peregrine Global Services headquartered in Gillette Wyoming and includes materials from a variety of sources. Peregrine Global Services through its Leadership Institute division has been conducting succession plan workshops and consulting for organization since 2005.
Learning Outcomes

The learning outcomes for the module are as follows. With the completion of this module, learners should be able to:

1. Define succession planning.
2. Calculate the cost of turnover for their organization.
3. Evaluate the advantages and disadvantages of promoting from within versus hiring externally.
4. Define talent management.
5. Conduct a skills gap analysis.
7. Conduct succession planning and build a succession plan.
8. Perform succession planning communications.
9. Identify key employee development activities and build developmental plans.
10. Develop organizational coaching and mentoring programs.
11. Perform career development activities.
12. Manage an organizational succession plan.
13. Avoid the pitfalls of succession planning and talent management.

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For more resources on Succession Planning & Talent Management, check out these articles and videos:

- Video: Successful Succession Planning by Gregg Learning
- The Process
- Recorded Presentation: Key Steps to Effective Succession Planning
- Downloadable Templates and Guides
- Succession Planning Practices
- Principles for Successful Succession Planning
- Article: The Comprehensive Guide to Succession Planning
- Article: 7 Steps to Successful Succession Planning
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• Guidelines for Effective Employee Development  
• Employee Development Methods  
• Common Issues and Challenges in Developing Employees  
• Article: 5 Ways to Improve Employee Development at Your Company  
• Article: The Missing Piece in Employee Development  
• Article: 7 Important Ways to Develop Your Employees  
• Creating Effective Employee Development Plans  
• Article: 4 Ways to Develop Employees for Success  
• Article: See the 14 Best Ways for Employers to Develop Their Employees  
• The Employee Experience  
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• Creating the Employee Experience  
• Article: The Importance of Training & Development in the Workplace  
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• Creating the Coaching/Mentoring Environment  
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• Developing Employees Through Mentoring  
• Article: Developing Staff Through Mentoring  
• Organizational Benefits of Coaching & Mentoring  
• Ted Talk: What Baby Boomers Can Learn from Millennials at Work, and Vice Versa  
• Types of Mentoring Programs  
• Article: How Do Companies Use Mentoring in the Workplace?  
• Mentoring Requirements  
• Article: Creating Leaders Through Mentoring Programs |
| Section 11: Career Development | • How to Start a Mentoring Program  
• Article: How to Develop High Potentials with Virtual Mentoring |
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| Section 12: Managing the Succession Plan | • Ted Talk: Profit is Not Always the Point  
• Employee Development Methods  
• Article: 5 Steps to Create a Career Development Plan for Yourself |
| Section 13: Avoiding Potential Pitfalls | • Video: The Top Three Reasons why Organisations Struggle with Succession Planning by Tom Cox  
• Managing Leadership Change Through the Succession Plan  
• Article: Key Steps in Navigating the Succession Planning Process  
• Succession Management for Non-profits  
• Article: Succession Planning: A Risk Management Approach  
• Video: Succession Planning Next Practices by Lepora Menefee  
• Succession Planning and Management  
• Video: What Are the Benefits and Challenges Around Succession Planning? By Rowena Crosbie. Tero Trainers |
| Section 14: Summary and Assessment | • Recorded Presentation: Avoiding Succession Planning Pitfalls  
• The Most Common Mistakes  
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• Article: Succession Planning Problems: 6 Pitfalls to Avoid  
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• Article: Avoiding CEO Succession Planning Pitfalls |

**Delivery**

The module is delivered using Peregrine’s Learning Management System (LMS) known as CMAD. Course instruction is with asynchronous online learning activities.
Downloads

1. A Succession Planning Guide
2. A Succession Plan Template
3. A Succession Plan Question & Answer Guide
4. Critical Role Identification Questionnaire
5. Success Profile
6. Succession Nomination Survey
7. Succession Slate Worksheet
8. Candidate Needs Assessment
9. Development Plan
10. Development Activities Tracker
11. Progress Measurement Scorecard
12. Succession Planning Checklist
13. Succession Planning Assessment & Readiness Survey
14. Example EvaluSkills Participant Report
15. Example EvaluSkills Group Report

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Assessment

Throughout the module, there are in-progress quizzes and short exercises to ensure understanding of the instructional content. A completion certificate is issued when the learner obtains at least 80% on the final exam.

Hours and Articulation

Learner hours are shown in the following table. The hours are based on both the time within the module and time away from the module conducting application activities.

<table>
<thead>
<tr>
<th>Section</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 1: Understanding Succession Planning</td>
<td>2</td>
</tr>
<tr>
<td>Section 2: The Cost of Turnover</td>
<td>2</td>
</tr>
<tr>
<td>Section 3: Promoting from Within Versus Externally</td>
<td>1</td>
</tr>
<tr>
<td>Section 4: Talent Management</td>
<td>3</td>
</tr>
<tr>
<td>Section 5: Skills Gap Analysis</td>
<td>3</td>
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<tr>
<td>Section 6: CEO Succession Planning</td>
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<tr>
<td>Section 7: Building the Succession Plan</td>
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<tr>
<td>Section 8: Succession Planning Communications</td>
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<tr>
<td>Section 9: Developing Employees</td>
<td>3</td>
</tr>
<tr>
<td>Section 10: Coaching &amp; Mentoring</td>
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<tr>
<td>Section 11: Career Development</td>
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<tr>
<td>Section 12: Managing the Succession Plan</td>
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<tr>
<td>Section 13: Avoiding Potential Pitfalls</td>
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<tr>
<td>Section 14: Summary and Assessment</td>
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<tr>
<td><strong>Total Hours</strong></td>
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</tbody>
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