

**Someone Take the Wheel...
Succession Planning**

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Outline

- Definition
- “ The Tracks We Leave Behind”
- Benefits
- Obstacles
- Steps
- Case Study

Definition

- **Process for identifying and developing internal personnel with potential to fill key or critical organizational positions**
- **Knowledge transfer**
- **Should replace reliance on individuals with reliance on systems**
- **Continuous, annual process... a journey**
- **Talent assessment aligned with developmental activities**
- **Can be accomplished without anyone ever realizing it**
- **Fun and rewarding**

The Tracks We Leave Behind

- Culture
- Curiosity
- Vision
- Values
- Passion
- Scope
- Reputation
- Assets
- Partnerships
- Mistakes

Your Job

- **Exceptional leadership**
- **1. health care leadership is different**
 The relationships, life-death nature of the work, emotional demands and financial challenges are unique and leaders must have a distinct approach
- **2. health care is in desperate need of great leaders**
 Leaders equipped to deal with the healthcare field faced with declining reimbursement, professional labor shortages and increasing sophistication and cost of medical technology may well be healthcare's greatest challenge of the decade
 Who can handle this high-stakes environment?
 Malpractice public reporting, patient safety

Your Job

- **3. the science of leadership is evolving**
 Marrying leadership performance with current research
- **4. not all leadership competencies are equally important**
 Long lists of leadership competencies are ok for job analysis, but not at all helpful in planning for development and less helpful when used as a way to discern differences between candidates
- **5. leadership development is your responsibility**
 Exceptional leaders take responsibility for their own development...they do not wait for their superiors to guide them or to sponsor needed events

Benefits

- Ensures availability of experienced and capable employees that are prepared to assume key roles
- Accelerates the transition of qualified employees from individual contributors to managers and leaders
- Develops talent and long-term growth
- Improves workforce capabilities and overall performance

Benefits

- Improves employee commitment and retention; ownership
- Career development requirements for existing employee a defined
- Demonstrates support for the employees
- Counters difficulty in recruiting externally
- Focuses on leadership continuity and improved knowledge sharing
- Builds a “deep bench”

Benefits

- Provides effective monitoring and tracking of proficiency levels and skill gaps
- Unleashes potential to push past self imposed limitations
- Establishes safeguards if key employees leave...
- Building a system of succession plans teaches you a great deal about your department
- Even a temporary replacement who is not able may be the downfall of the department
- Confusion at transition can lose the trust of the customers

Obstacles

- “Gray Ceiling” baby boomers are working longer; hampering career advancements for the gen Xers
- Who “ gets it”
- How do you setup learning experiences
- Effects of de-recruiting. Lack of leadership that push good people out of the organization.
 - #1 out of top 10 reasons an employee leaves his/her jobs is “ their boss”
 - Boss, challenge, learning, opportunities, responsibility and respect.

Obstacles

- **Generational differences in learning styles.**
- **Succession planning is an avoided topic.**
- **Senior leadership doesn’t want to imply you need to go**
- **You don’t want to imply you are thinking of going**
- **Control by virtue of the perception that no one else could possibly do your job**
- **Not really sure what to do**
- **Cost of opportunities**

Steps

- Make it part of the overall business plan
- Know the crucial roles in your department
 - For every task, program, or function identify who is relied upon for ensuring it is done
- Job descriptions; reviewed annually
- A list of what a key employee does
 - Every day, monthly, intermittently
 - Calendar entries
 - Where is everything
 - Critical relationships
- Create some redundancy
 - Assurance that no fewer than 2 other key employees can accomplish the duties of one other key employee.
 - Effective succession planning, also useful in the event of sudden departure to easily redistribute jobs to co-workers

Steps

- Identify the high potential employees
- Pay careful attention to the top 20%
- Identify a clear path for the talented
- Create career development models
 - Pay them
 - Grow them
 - Keep them marketable
- Create a talent dashboard

What is Competency?

- Define competencies:
 - Intelligence and skills tests
- David McClelland moved to a broader order than skill focused definition
- Include: broad collection of knowledge, skills, abilities characteristics..Include values, ethics, integrity, thinking, problem solving interpersonal skills, listening embracing diversity, tolerance respect , change management, strategic planning and risk taking. These do not come in a class room, but rather improve slowly over time as a result of mindful practice, feedback and more practice..

Steps

- Create a match between department future needs and aspirations of an individual
- Provide the talented growth opportunities that stretch them and provide promising opportunities
- Provide a clear definition of the capabilities required to undertake roles

Steps

- Special –temporary assignments
- Bring them in close...create a connection
- Set up “ shared-drive” data base
- Set up opportunities for them to engage with top leadership
- Coordinate some free time for creative problem solving, research

Case Study

Resources

- Wikipedia
 - *Succession Planning*
 - *Global Talent and Next Generation Workforce*
- Graziado business report; 2002 vol 5 issue 1
“Choosing Tomorrow’s Leaders Today”
- Forbes.com 2009/07/30 *Succession Planning*
- Community Driven Institute; *Succession Planning: The Elephant in the Room*
