
THE IMPORTANCE OF SUCCESSION PLANNING & HOW YOU CAN START THE PROCESS

ZELLE HR SOLUTIONS



OBJECTIVES

1. Define and understand the impact of succession planning on your organization
2. Learn tools to utilize in the succession planning process
3. Define your key performers and potential for advancement within the organization
4. Create timelines and individual development plans to implement for the future
5. Implementation of an effective succession plan



SUCCESSION PLANNING

The process of identifying critical positions within your organization and developing action plans for individuals to assume those positions. Must take a holistic view of future and current goals.



STRENGTHEN YOUR ORGANIZATION

Long term, a succession plan strengthens the organization and individuals by:

- Identifying critical positions and highlighting potential vacancies
- Selecting key competencies and skills necessary for business continuity
- Focusing development of individuals to meet future business needs

Generally, a 12 to 36-month process of *preparation*, not *pre-selection*.



WHY SUCCESSION PLAN?

01

Adapt to demographic changes and talent scarcity

02

Identify skill gaps and training needs

03

Retain institutional knowledge

04

Invest in employees to boost morale and retention

05

Replace unique or highly specialized roles or individuals



COMMON MISTAKES OF SUCCESSION PLANNING

Picking or playing to favorites

No objective process to spot successors

You don't tackle the hard conversations

The process becomes a competition

The process is a secret within the organization





SUCCESSION PLANNING 9 BOX

		Potential for Advancement		
		7+ yrs	3-6 yrs	0-2 yrs
Long-term Performance	High			
	Middle			
	Low			

Key Performers:

Additional Employees:

Definitions:

Potential for Advancement - Individual has the potential to be promoted one to two levels during the stated period of time.

Long Term Performance - Relative performance of the individual over the past 3-5 years as compared to their peers.

Key Performers - Individual who is great in their role but has no upward mobility.

Additional Employees - Individual who needs improvement, not meeting expectations or on a performance improvement plan.

SUCCESSION PLANNING OBSTACLES

Creation of
individual
development
plans

Resist to change

Lack of support

Organizational
silos

Weaknesses in
performance
management

Lack of time

Rewarding the
wrong behavior



CREATING AN EFFECTIVE SUCCESSION PLAN

- Prepare leaders to participate
- Align the plan with business objectives
- Use a variety of methods
- Incorporate into performance management conversations
- Take a 'birds eye view' of the organization periodically
- Look beyond the obvious
- Job advancement vs. job development
- Plan for knowledge transfer



IMPLEMENT THE PLAN

- To have the most effective succession plan, you must remember and communicate the ‘why’
- Having continuous open conversations around growth, development, future goals, and organizational vision will create a culture of transparency—leading to retention!
- Successful implementation takes time, commitment, follow-through, and feedback





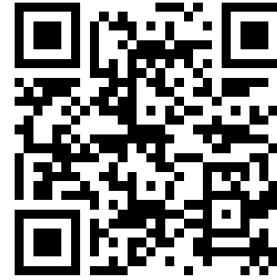
CHAD THIES

PRESIDENT
CHAD@ZELLEHR.COM



JAKE MCMULLIN

DIRECTOR OF RECRUITING
JAKE@ZELLEHR.COM



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OUR CONTACT
INFORMATION INTO
YOUR PHONE!

QUESTIONS?

[ZELLEHR.COM](https://zellehr.com) | CONNECT@ZELLEHR.COM | 402.323.1664

