



CONNECTIONS SUMMIT

◆ ELECTRICITIES

Succession Planning

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Organizations are Organic...



DON'T GET DONOR REJECTION

You wouldn't take a random kidney from one person and transplant it into another without serious risk of donor rejection.

The same is true when you consider new programs and processes for your organization.

What is Succession Planning?



CREATE A DEFINITION

- *in table groups*
- *discuss how you define it*
- *try to align a single definition*
- *be prepared to share back*

“Preparing employees for possible future roles.”
SHRM

“*Business process* to ensure *organizations*
have the *capability* to *deliver* current and future
services.” **Leverage HR**

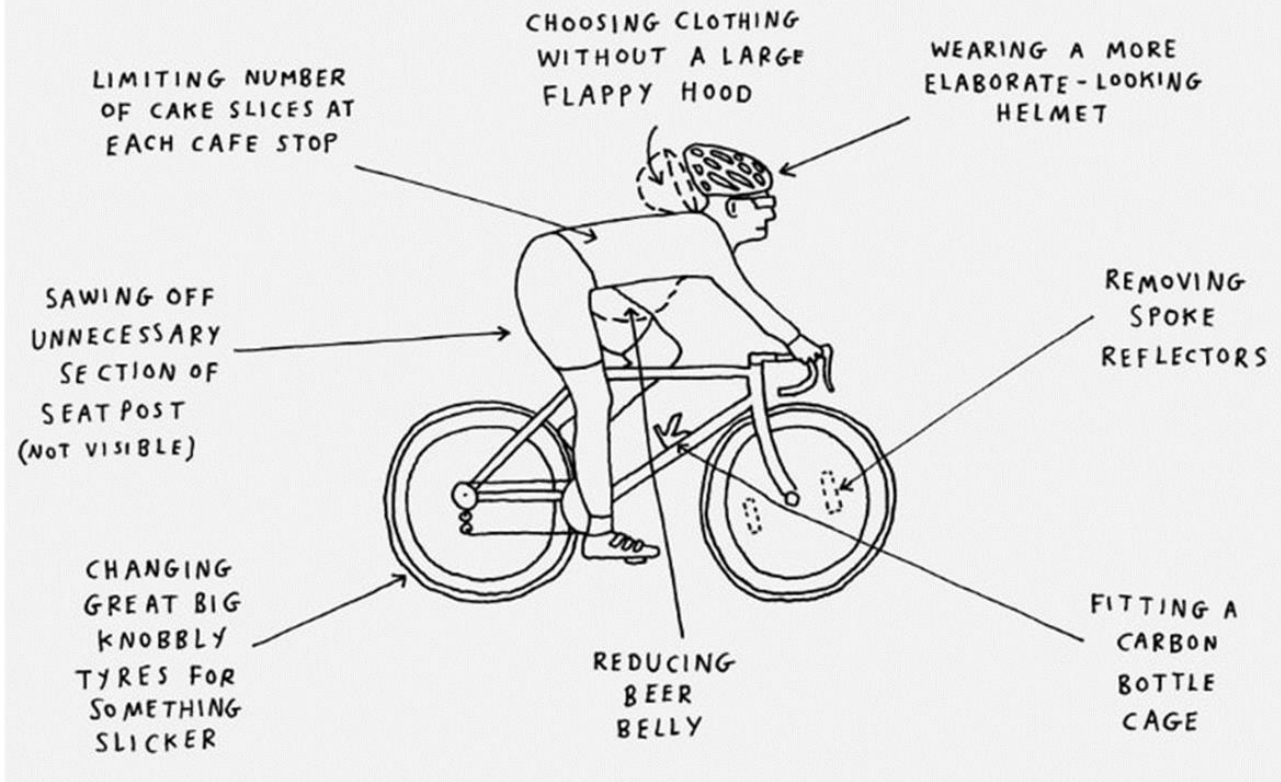
Definitions matter

“Business process to ensure organizations have the capability to deliver current and future services.” Leverage HR

- **Business** – it’s core to the organization like budgeting
- **Process** – it’s not an event or project
- **Organization** – to be truly strategic it should be an enterprise process
- **Capability** – it’s the ability to do something...people or non people related
- **Service** – it’s about being able to deliver what’s needed today and tomorrow

Marginal Gains

HOW THE PROFESSIONALS MAKE SMALL CHANGES TO IMPROVE THEIR PERFORMANCE



Sir Dave Brailsford, GM British Olympic Cycling Team

“Improving everything by 1% can results in exceptional improvements”

- **1998 one of the lowest ranked**
- **2004 two Olympic golds**
- **2008 and 2021 8 golds each**
- **2010’s 6 Tour de France wins**

Marginal Gains Case Studies

Retiring City Manager

- *internal candidate identified*
- *how to ensure they are ready for the position*
- *also requires a second leader to expand their role to take on new responsibilities*
- *completed success profile: experiences, relationships, skills needed and coaching*
- *both leaders and City Council confident there is a clear plan for ensuring success*

Municipality new DEI lead

- *new role combining DEI and recruiting*
- *previous two hires left in < 3 months*
- *during recruiting proactively advertised Success Catalyst Program™ (SCP) investment for position*
- *completed 100-day plan with stakeholder interviews, assessments, coaching*
- *one of highest performers 1 year in*
- *ROI calculated at 105%*

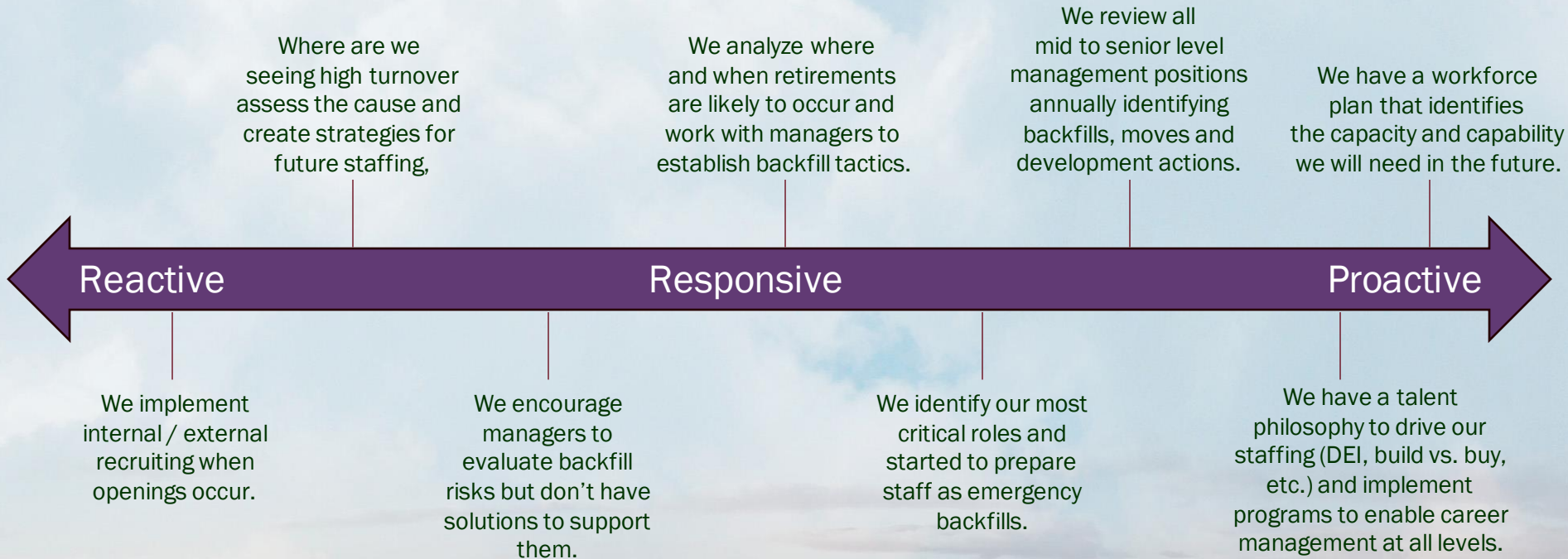
Municipal Electric Field

- *retiring superintendent*
- *focus groups / field visits with supervisors and staff*
- *6 two-hour modules delivered to current supervisors and high potential staff*
- *clear success profile for superintendent and supervisor role*
- *interviews / feedback against success profile and implemented SPC*
- *ROI calculated at 130%*

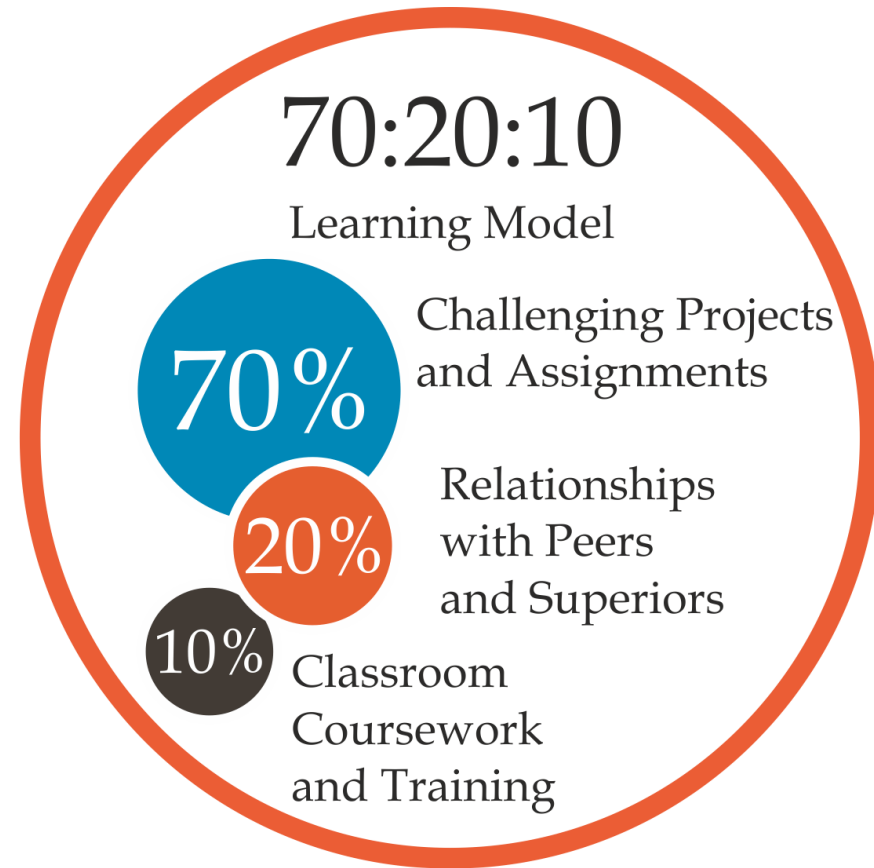
Retirement System facing increased scrutiny for new headcount requests

- *organization grew from \$9B– \$22B and the board began scrutinizing and denying all new headcount requests*
- *developed a custom four-stage tool business case tool for evaluating new roles, calculating the ROI, and developing the narrative for new requests*
- *Implemented pilot then trained leadership team in half day sessions resulting in approval of all future headcount requests*
- *business case tool became the foundation for introducing enterprise succession planning*

The Gap Continuum



Developing Talent



Crowdsourcing

- *What are you doing in these areas today?*
- *Share your best practices with your peers*

Investment approach to development

	stay and grow	new hires / promotions	accelerated development
Sr Leadership	/	/	/
Mid Level	/	/	/
Front Line Leaders	/	/	/
Emerging	/	/	/

Investor: “What should I invest my money in?”

Advisor: “That depends, what are you trying to accomplish?”

- Where *are you investing* today?
- Where *should you invest* to get the greatest return?

About Leverage HR



OUR SOLUTIONS

Connecting Workplaces & Crafting Inclusive Cultures

We partner with you to get you from where you are to where you need to be.

LEADERSHIP DEVELOPMENT

We partner with you to design, develop, and facilitate virtual and in-person customized leadership training programs and workshops from the board to the front line, including differentiated development for diverse leaders.

DIVERSITY, EQUITY, AND INCLUSIONS SOLUTIONS

We partner with you to build the strategies, business cases, and solutions required to create inclusive cultures that attract critical talent pools and unlock performance and innovation.

LEADER AND TEAM COACHING

We partner with you to enable individual leaders and leadership teams understand how their behaviors affect others and impact results. We align actions and commitment for improved leadership approaches.

ORGANIZATIONAL EFFECTIVENESS

We partner with you to pinpoint how to better attract, retain, and develop the talent you need, while building culture and alignment to ensure that every person is working towards the same goal.

CONNECTION IS AT THE HEART OF EVERYTHING WE DO

Credentialed PHR, ICF, WABC, Advanced Degrees

Certified DISC, business chemistry, D & I, EQ, FIRO*B, 5 Behaviors, Hogan, MBTI, Prosci, Strengths Finder, Various 360's, Workplace Big 5

Public Sector clients

Municipalities

- City of Dublin
- City of Greeley
- City of Hilliard
- City of Columbus
- City of Westerville
- City of Upper Arlington

Counties

- Columbus Zoo & Aquarium
- Franklin County Auditor's Office
- Franklin County Engineer's Office
- Orange County Employer Retirement System

Energy

- American Municipal Power
- Philadelphia Gas Works
- Puget Sound Energy
- Westerville Electric

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DUNS 03-243-7047



We are a **VALUES-DRIVEN** organization!

PERSONAL

- Solutions start with you
- Build trust for thought partnership
- Provide multilingual delivery

TAILORED

- Connect dots to make the solution effective
- Experienced and credentialed consulting team who have been in your shoes
- Cadenced service reviews

IMPACT

- Qualitative & quantitative metrics
- Trusted by 25+ public/private sector organizations
- 93% renewals

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