



# Our Future Leaders- Succession Planning 101

IDENTIFYING AND DEVELOPING OUR  
LEADERS OF THE FUTURE

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# Why is Talent Planning important? Why do we need to develop our people?

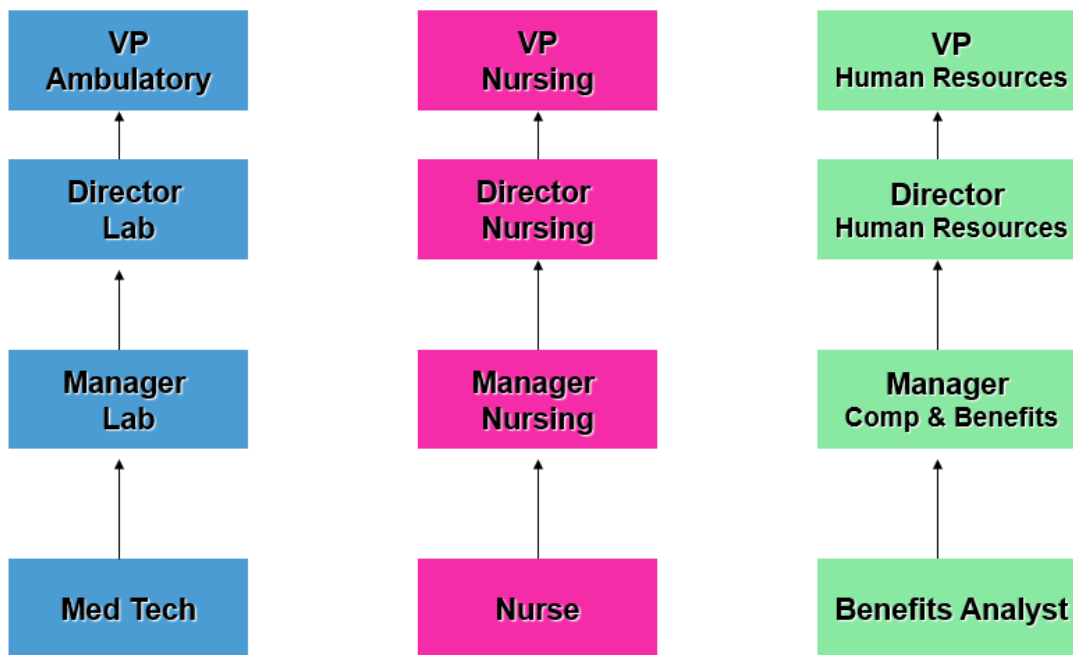
Breakout Activity Assignment:

1. Work with your group to answer the guiding question.
2. Have a scribe record group discussion.
3. Choose a spokesperson to share findings with class.

Breakout Group Notes

Breakout Activity Debrief: Importance of Talent Planning

# Traditional Succession Planning

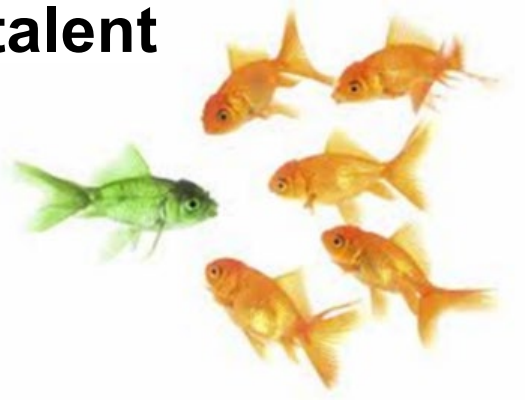


# Talent Pool Concept



# What are the advantages of talent pools?

- More Career Paths for high potentials
- Minimize silos
- Increase Innovation
- Promote diversity

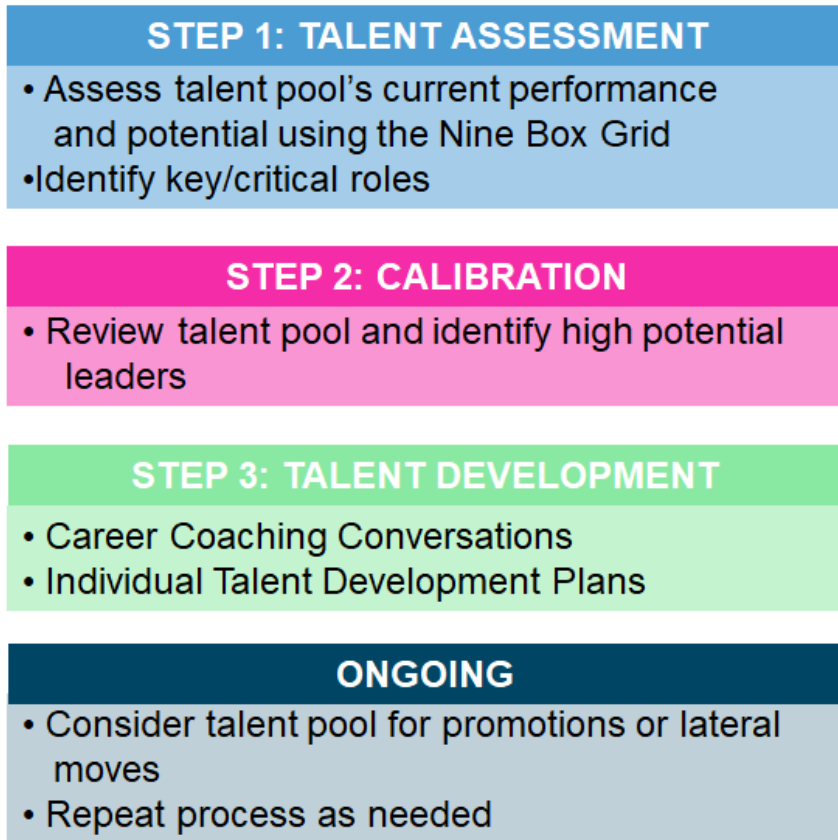


## Place more focus on strengths

- **38%** more likely to lead high-productivity teams
- **44%** more likely to earn high customer satisfaction scores
- **50%** more likely to have low employee turnover

*For additional information, check out "Now, Discover Your Strengths," by Marcus Cunningham and "Clifton Strengths" by Gallup*

# Talent Planning Process at UNC Health



**The Process**

# Talent Assessment

Individually assess your direct reports on performance and potential.



## DEFINITIONS

### Performance

demonstrated track record in current role

### Potential

exhibits a defined set of leadership characteristics that may predict future success

### High Potential

people with medium to high performance AND medium to high potential

### Talent Pool

high potentials from across the organization who are ready now or in the next 1 – 2 years to move into a new leadership role

### Possible Successors

high potentials targeted for key future roles

# The Nine Box Grid

A Tool to assess Performance and Potential

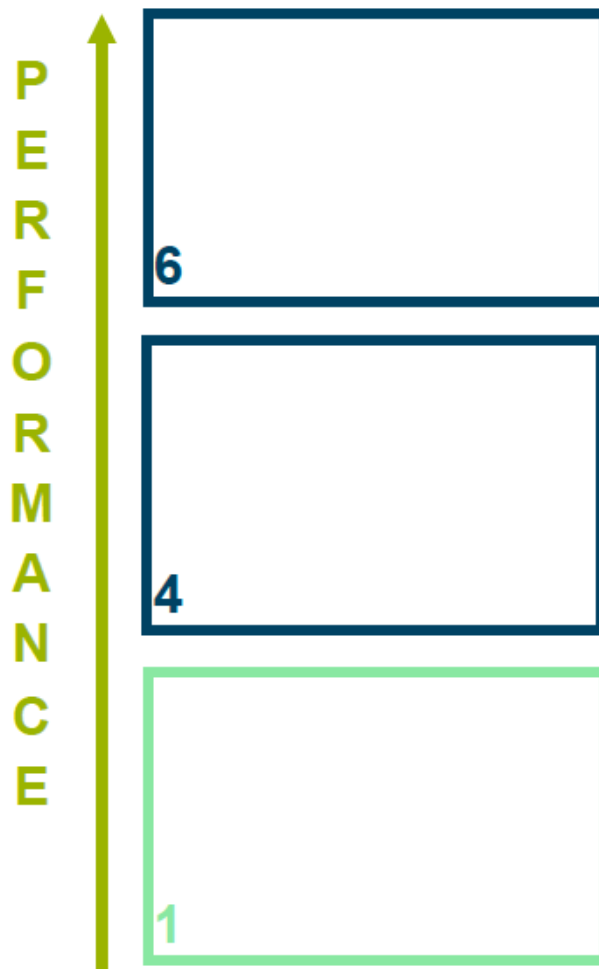


# Assessing Performance

- Current performance rating
- Patient satisfaction rating
- Teammate satisfaction rating
- Meeting goals
- Meeting budget

## Assess Performance—Current Roles

Equally Distribute your people between boxes 1, 4, and 6





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# ASSESSING POTENTIAL

## Characteristics of High Potential People

**Learning Agility** – Demonstrate the ability to adapt and transfer skill and knowledge to a new environment; are a quick study, resourceful, and achieve excellent results

**Curiosity** – Seek out new experiences, ideas, knowledge; seek feedback and value continuous learning in self and others; demonstrate an interest in taking on additional responsibility and more challenging roles

**Insight** – Proactively gather and make sense of a vast amount of information from a wide range of sources to discover new insights; comfortable with complexity, ambiguity and explaining their thinking to others

**Inclusive** - Demonstrate awareness of their own biases and preferences, actively seek out and consider diverse views and perspectives to inform better decision-making.

**Engagement** – Connect with both the hearts and minds of others, communicate a persuasive vision, respects and values differences, and maintain healthy relationships even in adverse situations

**Determination** – Recognize opportunities, lead change, and accept the consequences of being ahead of others

# Assess Potential—Current Roles



Directions: Insert the names across the high medium and low for potential, keeping them on the same performance rating row.


POTENTIAL

## High Potential Talent Pool

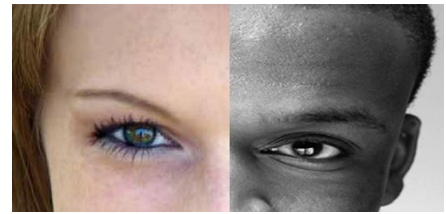


9 – TOP TALENT	7 – RISING STAR	8 – RISING TALENT

### Questions to ask yourself when looking at your talent pool?

- Does everyone listed truly match the 7, 8 and 9 box definitions?
- Do we see any bias?
- Do you notice a higher ratio of men vs. women?
- Do we see racial or age disparities?

# Unconscious Bias



What is Unconscious Bias?



## Potential Bias

Bias in talent assessment

Bias in hiring decisions

Bias in medical recommendations

## Automatic Processing

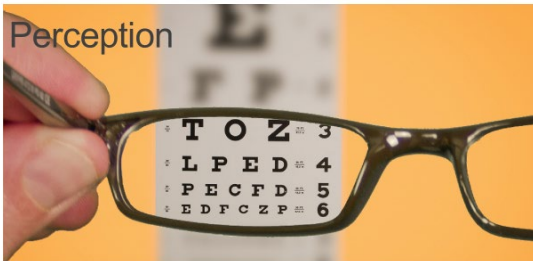


We don't see what actually is because **we don't see with our eyes, but with our brains.**

Our brains process information in flawed ways due to automatic processing, generalized associations and stereotypes.

Discussion notes:

## Perception



*We believe we accurately perceive the world around us.*

## Consciousness



*We are consciously aware and thus in control of our internal influences on our perceptions and behaviors.*

# Key Roles

- Your role
- Openings could be due to retirement, performance issues, personal issues, or planned promotions
- Mission critical roles critical to operations or strategy execution that would keep you up at night if it became vacant
- New roles due to growth or expansion
- Roles that are difficult to recruit for
- Roles that require unique and essential talents and skills

## Identify Key Roles Activity

Identify at least 1 key role, other than your role.

# Talent Development

## Transparency Agreement



### We will...

conduct career coaching conversations with high potential leaders and let them know we are committed to helping them grow their career

### We will not...

share specific ratings or build unrealistic expectations of future promotions



## Assess Interest and Develop Talent

Have coaching conversations with members of the Talent Pool.

### Career Coaching Worksheet

The purpose of the Career Coaching Conversation is to assess your career interests and support your professional development. Please complete this form and email it to \_\_\_\_\_ before your meeting.

Your Name	Date
Your Title	

<b>My Accomplishments</b> Reflecting on your career, what are you most proud of?	<b>My Disappointments</b> What disappointments have you had in your career?

**My Current Job** What have you done for your own professional/career growth in the last few years?

New Skills:

New Experiences:

What more can you do to develop in your current role?

**My Career Goals**

What are your hopes for your career in the next 1 – 5 years?

What do you ultimately aspire to do?

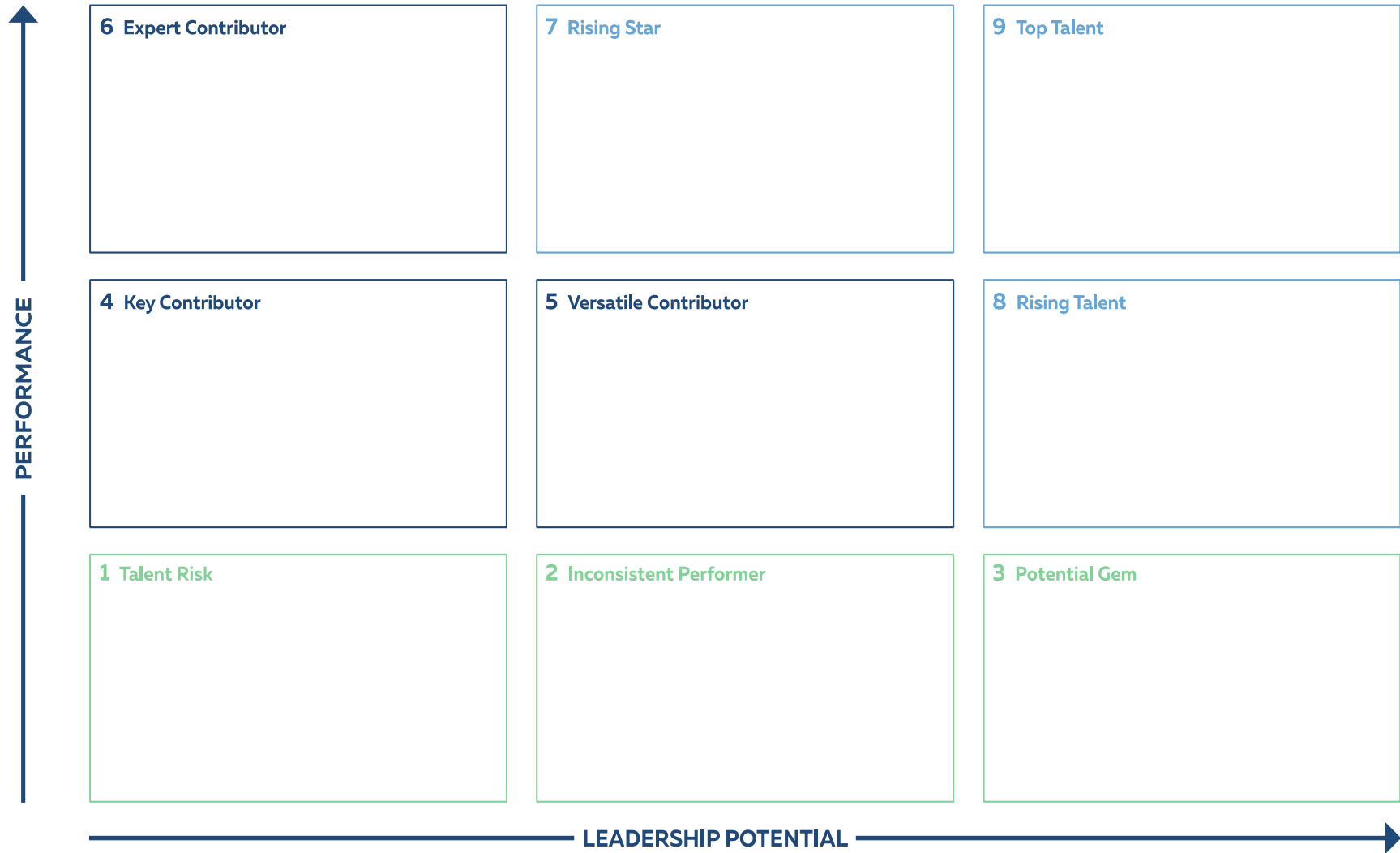
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# Resources

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# Nine Box Grid (Form Fillable)



# Reality Check



Color Coding Key:		
Needs Attention	Core Team	High Potential Talent Pool

# Talent Planning Worksheet

<b>YOUR Role:</b>		
Key Criteria for Success: <i>(Consider job-specific skills, behaviors and attributes of high potentials.)</i>		
<b>Names of Possible Successors</b>	<b>Relevant Skills and Attributes</b>	<b>Professional Development Plan</b>
<b>Interim Successor (serving for 6 months to 1 year)</b>		
<b>Immediate Successor(s) (Ready Now)</b>		
<b>Successor(s) ready in 1 – 2 years (Current and Future Stars)</b>		
<b>Successor(s) ready in 3 – 5 years</b>		
<b>Attributes of High Potential Leaders</b>		
<b>Learning Agility</b>	Demonstrates the ability to adapt and transfer skill and knowledge to a new environment. Is a quick study, resourceful, and achieves excellent results.	
<b>Curiosity</b>	Seeks out new experiences, ideas, knowledge; seeks feedback and values continuous learning in self and others; demonstrates an interest in taking on additional responsibility and more challenging roles.	
<b>Insight</b>	Proactively gathers and makes sense of a vast amount of information from a wide range of sources to discover new insights; comfortable with complexity, ambiguity and explaining their thinking to others.	
<b>Inclusive</b>	Demonstrate awareness of their own biases and preferences, actively seek out and consider diverse views and perspectives to inform better decision-making.	
<b>Engagement</b>	Connects with both the hearts and minds of others, communicates a persuasive vision, respects and values differences, and maintains healthy relationships even in adverse situations.	
<b>Determination</b>	Recognizes opportunities, leads change, and accepts the consequences of being ahead of others.	

<b>KEY Role Reporting To You:</b>		
<b>Key Criteria for Success:</b> <i>(Consider job-specific skills, behaviors and attributes. The Leadership Core Competencies can serve as a guide.)</i>		
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# CAREER CONVERSATION



Develop *Me*

The purpose of the Career Conversation is to assess your career interests and support your professional development. Please complete this form and email it to \_\_\_\_\_ before your meeting.

Your Name \_\_\_\_\_

Your Title \_\_\_\_\_ Date \_\_\_\_\_

**Accomplishments** - Reflecting on your career, what are you most proud of? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

**Disappointments** - What disappointments have you had in your career? \_\_\_\_\_

\_\_\_\_\_

## MY CURRENT JOB

What have you done for your own professional/career growth in the last few years?

New Skills: \_\_\_\_\_

New Experiences: \_\_\_\_\_

What more can you do to develop in your current role? \_\_\_\_\_

\_\_\_\_\_

## MY CAREER GOALS

What are your hopes for your career in the next 1 - 5 years? \_\_\_\_\_

\_\_\_\_\_

What do you ultimately aspire to? \_\_\_\_\_

\_\_\_\_\_

## MY DREAM JOB

If you have interests outside of your current job, list positions within UNC Health that may interest you and why:

**Positions and/or Job Title**

**What about the position interests you?**

\_\_\_\_\_

\_\_\_\_\_

## MOBILITY

Are you willing to relocate to another affiliate [ ] YES [ ] NO

If yes, which one(s)? \_\_\_\_\_

## FINALLY...

What other things should we know about you and your career goals or interests? \_\_\_\_\_

\_\_\_\_\_



# Individual Development Plan

Leader Name	Leader Title	Date
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## Leadership and Management Behavioral Competencies

List the 3-4 competencies you would like to develop.


## Career Interests

List future roles, both lateral and upward, that you would be interested in developing yourself for in the future. Then identify developmental gaps that you need to work on to be ready to move into the role, should you be considered. This could include education, competencies, and/or experience.

Job Title	Development Gaps

## Developmental Activities

Identify specific Developmental Activities to incorporate into your development goals.

(A)ssignments		(E)xperiences		(L)earning	
Job expansion/enrichment	Six Sigma/Lean Project	Job shadow	Community Involvement	Executive Mentor	Assessments
Job rotation/swap/share	Start up/Turnaround	Mentor Others	Task Forces/Committees	Reverse mentoring	Internal/External courses
Interim leader role	Project in another area	Observe role models		Informational interviews	Professional Associations
Interdisciplinary team	Organizational project	Attend Exec Team meetings		Self Directed Learning	Executive coach



## Development Goals

Identify up to 3 development goals for the next 12 – 18 months and create an action plan for each.

### Goal 1:

My Plan – What specific actions will you take to accomplish this development goal?	Target Date	Date Completed	Involvement of Others

**Progress Update** – Be prepared to share your progress with your executive mentor every 3 – 4 months.

Update 1	Accomplishments	
	Obstacles	
	Next Steps	
Update 2	Accomplishments	
	Obstacles	
	Next Steps	
Update 3	Accomplishments	
	Obstacles	
	Next Steps	

## Development Goals

Identify up to 3 development goals for the next 12 – 18 months and create an action plan for each.

### Goal 2:

My Plan – What specific actions will you take to accomplish this development goal?	Target Date	Date Completed	Involvement of Others

**Progress Update** – Be prepared to share your progress with your executive mentor every 3 – 4 months.

Update 1	Accomplishments	
	Obstacles	
	Next Steps	

Update 2	Accomplishments	
	Obstacles	
	Next Steps	

Update 3	Accomplishments	
	Obstacles	
	Next Steps	