

Organizational Development Case Study:

Strategic Succession Management

THE BACKGROUND

- The organization: non-profit health system that provides healthcare services and assistance to elders

THE CHALLENGE

- Historically developed talent from within in an informal manner
- The process was neither sustainable nor scalable
- Many senior executives nearing retirement

THE OBJECTIVE

- Establish a succession planning process to address a challenging set of:
 - Internal factors
 - Imminent retirement of key senior leaders
 - Need to develop staff to respond to the changing needs of the elderly and their families
 - External factors
 - Increasing aging population driving increasing demand
 - Shift away from traditional nursing homes
 - Shrinking workforce and scarcity of good talent
- Provide a mechanism to enable organization to assess, select and develop the next generation of leaders who can lead the organization into the future

THE SOLUTION

- Established a future-focused competency model for the senior management team aligned with the business strategy
 - Developed success profiles for all senior leadership roles to determine role-specific job competencies, required experiences, and leadership expectations
- Facilitated an interactive Talent Review process
 - Each senior leader:
 - Assessed his/her direct reports against the new competency model utilizing a traditional 9-Box grid to map current performance and future potential
 - Presented their direct reports to an audience of peers and shared plans for succession, both planned and unplanned
 - Determined development activities based on peer input

THE OUTCOME

- Creation of a future-based competency model to be used in a variety of HR applications, especially as a development tool for senior talent
- Individual Success Profiles for senior-level roles
- Established a clear picture of the organization's bench-strength
- Process to regularly evaluate talent based on needs and expectations and to proactively identify development opportunities
- Identification of stretch assignments and development opportunities for next generation leaders
- Development of a consistent language and processes to communicate and develop important leadership competencies across the organization