

## Organizational Development: Strategic Succession Management

### Organization's Background

The organization is a non-profit health system that provides healthcare services and assistance to elders.

### Objective

Provide a mechanism to enable the organization to assess, select and develop the next generation of leaders who can lead the organization into the future.

### What We Accomplished

- 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

### The Challenge

This organization historically developed talent from within in an informal manner. However, the process was neither sustainable nor scalable. As many senior executives were nearing retirement, the organization needed to establish a succession planning process to address a challenging set of internal and external factors.

#### 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

### TLD Group's Solution

TLD Group established a future-focused competency model for the senior management team aligned with the business strategy that developed success profiles for all senior leadership roles to determine role-specific job competencies, required experiences, and leadership expectations.

Next, we facilitated an interactive Talent Review process for each senior leader assessing their direct reports against the new competency model utilizing a traditional 9-Box grid to map current performance and future potential. Then, we presented their direct reports to an audience of peers and shared plans for succession, both planned and unplanned. Finally, we determined the best-fit development activities based on peer input.



**“With the help of The Leadership Development Group, we were able to shift from a reactive succession planning process (replacement-focused) to a proactive, future-oriented process with the intent to build a pool of leaders who have new future-oriented competencies to lead the organization in any job. We are thoughtfully building our talent to be positioned for future success.”**

President and CEO

