

Business Succession Planning



Sample

Corporate Training Materials

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Preface

What is Courseware?



Welcome to Corporate Training Materials, a completely new training experience!

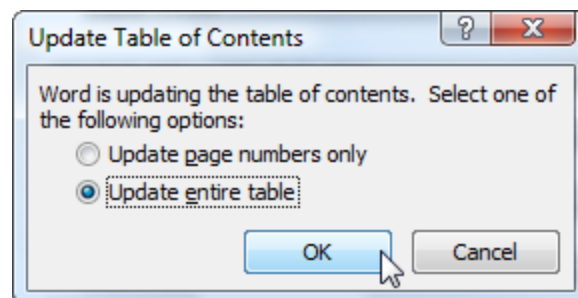
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

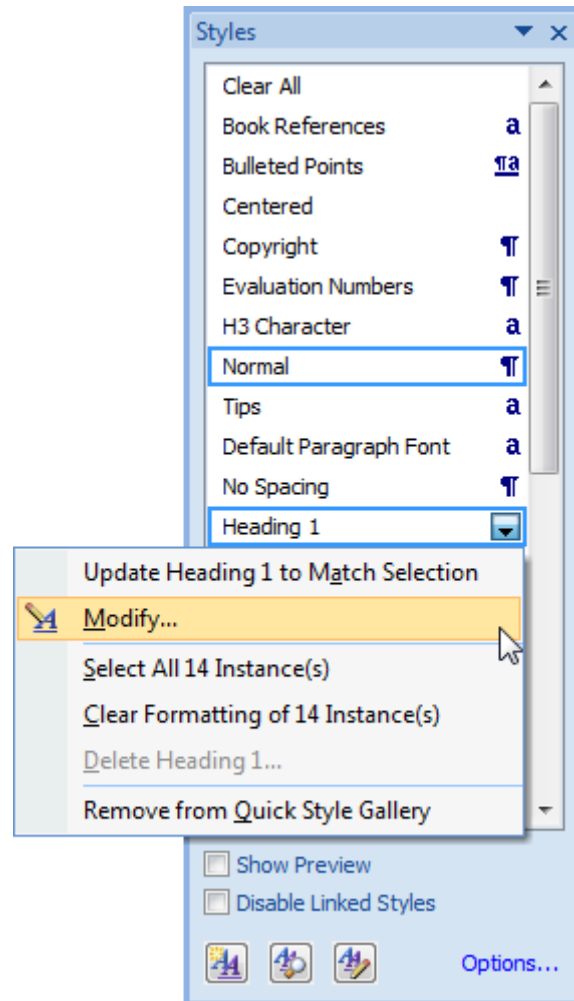


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
 - Use examples, case studies, and stories that are relevant to the group.
 - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
 - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest [Experiential Learning](#) by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

Icebreakers

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

Icebreaker: Friends Indeed

Purpose

Have the participants moving around and help to make introductions to each other.

Materials Required

- Name card for each person
- Markers

Preparation

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

Activity

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.

Training Manual Sample

On the following pages is a sample module from our Training Manual. Each of our courses contains twelve modules with three to five lessons per module. It is in the same format and contains the same material as the Instructor Guide, which is then shown after the Training Manual sample, but does not contain the Lesson Plans box which assists the trainer during facilitation.

The Training Manual can be easily updated, edited, or customized to add your business name and company logo or that of your clients. It provides each participant with a copy of the material where they can follow along with the instructor.

Change is the law of life. And those who look only to the past or present are certain to miss the future.

John F. Kennedy

Sample Module: Succession Planning Vs. Replacement Planning



Succession planning and replacement planning are two different things. Replacement planning is focused on identifying immediate understudies, while succession planning is focused on developing talent to move forward.

What is Business Succession Planning?



Successful succession planning is related to leadership development. It develops a pool of talent so that there are numerous qualified candidates throughout the organization to fill vacancies in leadership. Succession planning used to concentrate on developing leadership at the top level, but now it is building a strong talent base, which helps to increase employee loyalty and ensure the longevity of the company. This strategy requires recruiting qualified talent, creating a talent pool, and instilling

loyalty.

BENEFITS OF SUCCESSION PLANNING:

- Decreased turnover
- Increased employee satisfaction
- Improved commitment to company goals
- Enhanced image of the organization

WHAT DOES SUCCESSION PLANNING REQUIRE?

- **Identify the long-term goals and objectives of the business:** The long-term goals directly relate to succession planning. Is the company's goal to grow or maintain its current position? Will it expand into other fields? All of these questions need to be addressed before creating a succession plan.
- **Understand the developmental needs of the company and identify employees who fit these needs:** The responsibilities of employees change over time. Some positions may be eliminated in the future while others will be added.
- **Recognize trends in the workforce and engage employees to build loyalty:** Understanding workforce trends will help you predict the needs of your organization. For example, are your key employees nearing retirement? Have you invested in talented employees to take on additional roles?

What Is Replacement Planning?



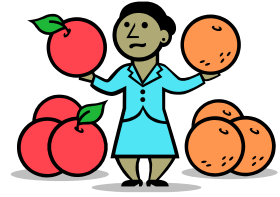
Replacement planning works under the assumption that the structure of the organization will not change. This is easier to apply in small family businesses that do not have any goals to expand or grow in the future. There are typically two or three “replacements” identified in the organization chart. Each backup is listed with his or her ability to replace an existing leader. The employees are not necessarily developed to understand the new working environment or smoothly transition into his or her new responsibilities.

Differences Between

Many executives believe that they are engaging in succession planning, but in reality they are still using replacement planning.

The Main Differences:

- Replacement planning focuses on finding suitable replacements only for top executives.
- Succession planning means that the company is easily able to fill vacancies throughout the business because employees are being empowered and developed.
- There is a short list of candidates in replacement planning.
- Succession planning builds a large talent pool.



Succession planning takes a little more time and effort from those in leadership, but it yields a high return on such an investment.

Deciding What You Need

There are several different factors that indicate when a company needs to implement or re-evaluate succession planning.



- **Turnover becomes critical:** The number of high-potential workers leaving is higher than average workers leaving. (This can happen in any economy.)
- **Employees feel undervalued:** When a majority of your employees feel that there is no room for advancement or that you choose too many outside hires, there is a succession-planning problem.
- **There are no replacements for key talent:** Should a valued member of staff suddenly leave, there is no one able to take his or her place.
- **Managers notice that there are not many candidates for promotion:** Employees who are not developed for leadership will never be promoted.
- **The time to fill metric is high or unknown:** The time to fill metric is the average length of time that it takes to fill a position. A high number means that the company needs to focus on succession planning.
- **The retention risk analysis is high:** A risk analysis uses different factors to determine the potential number of employees who will leave. These will factor in retirement and other trends.

Instructor Guide Sample

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box. Each Instructor Guide and Training Manual mirrors each other in terms of the content. They differ in that the Instructor Guide is customized towards the trainer, and Training Manual is customized for the participant.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.

Change is the law of life. And those who look only to the past or present are certain to miss the future.

John F. Kennedy

Sample Module: Succession Planning Vs. Replacement Planning



Succession planning and replacement planning are two different things. Replacement planning is focused on identifying immediate understudies, while succession planning is focused on developing talent to move forward.

What is Business Succession Planning?

Estimated Time	15 minutes
Topic Objective	Introduce and define succession planning along with its benefits and requirements.
Topic Summary	This exercise allows participants to define succession planning for themselves and how it fits in with the needs and plans of their organizations.
Materials Required	Worksheet One: Succession Planning
Planning Checklist	None
Recommended Activity	<p>Explore the main ideas of succession planning as a group. Share the statistics to emphasize the importance of business succession planning before having the students complete the worksheets individually.</p> <p>Call on a few participants to provide their answers and brainstorm ideas as a class.</p>
Stories to Share	According to a report from Hewitt Associates and Human Resources Planning Society, 85 percent of top performing companies make employee development a top priority. However, only one-third of companies have business succession plans.
Delivery Tips	Limit the amount of time to complete the worksheet. The completed worksheet can be explored in small groups of three or four, depending on the size of the class.
Review Questions	What are the benefits of business succession planning? What percentages of organizations make use of this strategy? Why?



Successful succession planning is related to leadership development. It develops a pool of talent so that there are numerous qualified candidates throughout the organization to fill vacancies in leadership. Succession planning used to concentrate on developing leadership at the top level, but now it is building a strong talent base, which helps to increase employee loyalty and ensure the longevity of the company. This strategy requires recruiting qualified talent, creating a talent pool, and instilling

loyalty.

BENEFITS OF SUCCESSION PLANNING:

- Decreased turnover
- Increased employee satisfaction
- Improved commitment to company goals
- Enhanced image of the organization

WHAT DOES SUCCESSION PLANNING REQUIRE?

- **Identify the long-term goals and objectives of the business:** The long-term goals directly relate to succession planning. Is the company's goal to grow or maintain its current position? Will it expand into other fields? All of these questions need to be addressed before creating a succession plan.
- **Understand the developmental needs of the company and identify employees who fit these needs:** The responsibilities of employees change over time. Some positions may be eliminated in the future while others will be added.
- **Recognize trends in the workforce and engage employees to build loyalty:** Understanding workforce trends will help you predict the needs of your organization. For example, are your key employees nearing retirement? Have you invested in talented employees to take on additional roles?

What Is Replacement Planning?

Estimated Time	15 minutes
Topic Objective	To understand replacement planning and what type of company uses it.
Topic Summary	Read through Handout One: Organization Chart. Identify positions on the chart that could change over time.
Materials Required	Handout One: Organization Chart
Planning Checklist	None
Recommended Activity	Identify at least two positions that could change if the company were to grow, and explore how this would affect the replacement strategy. Break into small groups of three or four and discuss the risks of keeping the replacement plan as it is.
Stories to Share	Note: This story is fictional but familiar. You can tell a similar story that you experienced personally to increase your emotional connection with the story. A project manager who managed to inspire his employees to great improvements in productivity recently retired. His supervisor wanted to increase productivity even further while cutting the bottom line. She replaced him with a qualified candidate who increased workloads while limiting the budget for valuable resources. The department quickly turned over, and months were spent training new employees who did not have much loyalty to the company.
Delivery Tips	If you are pressed for time, discuss the differences as a single group.
Review Questions	How does replacement planning choose successors? What are the pros and cons of simple replacement planning?



Replacement planning works under the assumption that the structure of the organization will not change. This is easier to apply in small family businesses that do not have any goals to expand or grow in the future. There are typically two or three “replacements” identified in the organization chart. Each backup is listed with his or her ability to replace an existing leader. The employees are not necessarily developed to understand the new working environment or smoothly transition into

his or her new responsibilities.

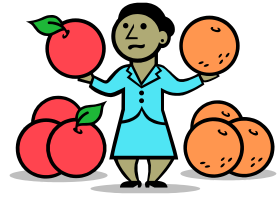
Differences Between

Estimated Time	15 minutes
Topic Objective	Understand the difference between business succession planning and simple replacement planning.
Topic Summary	Examine the Worksheet: Comparison. Circle all of the items that apply to your company's goals.
Materials Required	Worksheet Two: Comparison
Planning Checklist	None
Recommended Activity	<p>Read the differences between replacement planning and succession planning. Circle all items that apply to your business situation, now or in the future.</p> <p>Share your discoveries with the class.</p>
Stories to Share	Tell the story of Alverno College. The school encourages life-long learning by evaluating student performance rather than grading tests. Passing is not easy because students need to continually demonstrate their abilities. This encourages self-evaluation and awareness. What can businesses take away from the story when evaluating and developing employees?
Delivery Tips	If you feel you have time, split the participants into small groups to discuss the differences related to their companies. Write any common concerns on the board or flip chart.
Review Questions	Do all companies that claim to use succession planning actually put it into practice? What are the main differences you notice between the two?

Many executives believe that they are engaging in succession planning, but in reality they are still using replacement planning.

The Main Differences:

- Replacement planning focuses on finding suitable replacements only for top executives.
- Succession planning means that the company is easily able to fill vacancies throughout the business because employees are being empowered and developed.
- There is a short list of candidates in replacement planning.
- Succession planning builds a large talent pool.



Succession planning takes a little more time and effort from those in leadership, but it yields a high return on such an investment.

Deciding What You Need

Estimated Time	15 minutes
Topic Objective	Evaluate your business needs in succession planning.
Topic Summary	Read the Trends worksheet. How many of these trends do you see in your company?
Materials Required	Worksheet Three: Trends
Planning Checklist	None
Recommended Activity	Use the indicators for succession planning to fill out the worksheet. How critical do you think succession planning is to your business? Pair up with another participant who has a score similar to yours. Discuss ways that succession planning will benefit you.
Stories to Share	It is predicted that there will be a drop in qualified middle and senior managers in the next few years. International companies such as Dow Chemical are focusing on strategies to attract and retain qualified managers in China as well as America. Training and compensation are two strategies used to retain talent in a growing field.
Delivery Tips	If you are short on time after the exercise, do not break into small groups, have a brief class discussion.
Review Questions	What indicates the need to change succession planning?

There are several different factors that indicate when a company needs to implement or re-evaluate succession planning.

- **Turnover becomes critical:** The number of high-potential workers leaving is higher than average workers leaving. (This can happen in any economy.)
- **Employees feel undervalued:** When a majority of your employees feel that there is no room for advancement or that you choose too many outside hires, there is a succession-planning problem.
- **There are no replacements for key talent:** Should a valued member of staff suddenly leave, there is no one able to take his or her place.
- **Managers notice that there are not many candidates for promotion:** Employees who are not developed for leadership will never be promoted.



- **The time to fill metric is high or unknown:** The time to fill metric is the average length of time that it takes to fill a position. A high number means that the company needs to focus on succession planning.
- **The retention risk analysis is high:** A risk analysis uses different factors to determine the potential number of employees who will leave. These will factor in retirement and other trends.

Activities

During the facilitation of a lesson Worksheet or Handout may be utilized to help present the material. If a lesson calls for a Worksheet or Handout it will be listed in the Lesson Plan box under Materials Required. The trainer can then utilize the Activities folder for the corresponding material and then provide it to the participants. They are all on separate Word documents, and are easily edited and customized.

Below you will see the Worksheets or Handouts that are utilized during the training of the above lesson. They are located in the Activities folder and can be easily printed and edited for the participants.

Sample Worksheet: Succession Planning

Answer each question based on your current business plan.

1. What are the long-term goals of your company?

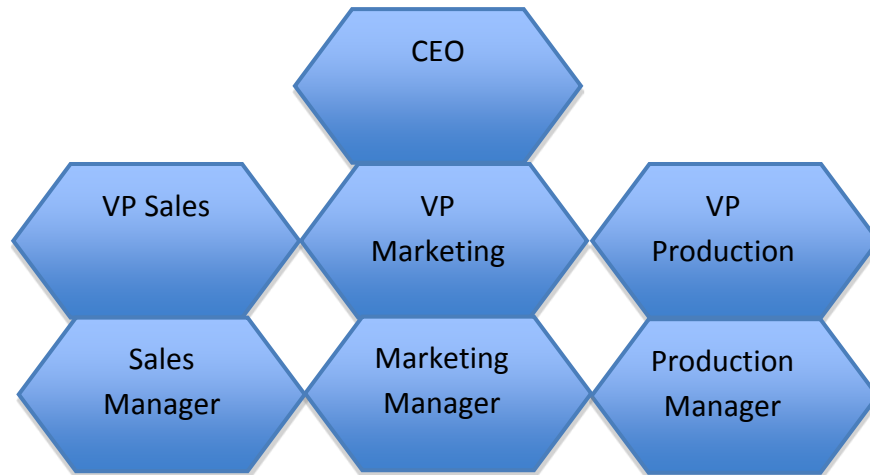
2. What impact will these goals have on key positions in the company?

3. How does your company currently attract qualified candidates and develop employees for future leadership? How would you like the company to do this?

Sample Worksheet: Organization Chart

Carefully examine the chart below. Identify positions that could change and how this would affect the replacement plan. Discuss your findings with your classmates.

The VP of Sales, Marketing, and Production are potential replacements for the CEO. The VP of Production has been with the company the longest, but the VP of Sales has better people skills.



Sample Worksheet: Comparison

Circle the items that apply to your business. How much succession planning do you already use? Is this how you want your company to operate?

	Replacement Planning	Succession Planning
Time Frame	6 months	6-36 months
Candidates	Readily available	Those with the best potential
Selection	Moves vertically through chart	Moves through the talent pool
Development	On the job	Action plans developed ahead of time
The Decision	Made by an executive or committee	Made by multiple managers

Sample Worksheet: Trends

Rank where your company falls in each category on a scale of one to five. One is ideal and five is high risk.

Turnover

1 2 3 4 5

Valuing employees

1 2 3 4 5

Replacements

1 2 3 4 5

Qualified candidates

1 2 3 4 5

Time to fill metric

1 2 3 4 5

Retention risk analysis

1 2 3 4 5

NOTES _____

Quick Reference Sheets

Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

Business Succession Planning

How to Gather Operational Data

Preparing for the business plan process requires data. Gathering some data is easy, while other things are a little tricky.



- **Questionnaires and Surveys:** People are more likely to answer anonymous questionnaires honestly.
- **Financial Reports:** Keeping a tab on financial reports will show you the effectiveness of new policies.
- **Meetings with different departments:** Have different departments meet to discuss needs and opportunities. Create cross-functional teams if necessary.
- **Conduct at-risk metrics:** Determine employee trends.

Develop a Vision Statement

Vision statements are similar to mission statements. Mission statements are centered on the current situation and strategies, while vision statements concentrate on the future of the company. What does it look like when the company goals are achieved? Vision statements are often used to guide mission statements. They inspire people based on common values. Vision statements may be created for a company, a project, or individuals.



WRITING A VISION STATEMENT:

- **Determine the values of the company:** Ask people how they feel about the future of the organization and its values.
- **Discover future goals:** Find out what vision people have of the company in the future. Attempt to create specific future goals.
- **Write and rewrite:** Vision statements should be able to change. Once a vision statement is drafted, it can and should be altered as the market changes and the company develops.

How to Know When You've Achieved Success

- **Goals are achieved:** Goals are an important indicator of success. When progress is made towards achieving different goals, it is clear that a plan is on its way to success.
- **Growth demands goal plans to be adjusted or expanded:** Changes in the company require changes in the basic goals and objectives. Sometimes the success of a project requires the plan to be expanded.
- **Succession planning becomes part of the company's culture:** Succession planning requires the support of employees at every level. When it is embraced in the company culture, there is little resistance to the plan, and goals become easier to achieve.



Certificate of Completion

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

CERTIFICATE OF COMPLETION

[Name]

Has mastered the course

Business Succession Planning

Awarded this _____ day of _____, 20____

Presenter Name and Title

PowerPoint Sample

Below you will find the PowerPoint sample. The slides are based on and created from the Training Manual. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.

Sample Module: Succession Planning Vs. Replacement Planning

Succession planning and replacement planning are two different things. Replacement planning is focused on identifying immediate understudies, while succession planning is focused on developing talent to move forward.

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What is Business Succession Planning?

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Deciding What You Need

There are several different factors that indicate when a company needs to implement or re-evaluate succession planning.

- Turnover becomes critical.
- Employees feel undervalued.
- There are no replacements for key talent.
- Managers notice that there are not many candidates for promotion.
- The time to fill metric is high or unknown.
- The retention risk analysis is high.



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