Participant's Packet:

Success With Succession

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MY NOTES:

Introduction

The Barbershop Harmony Society believes that the success of our organization rests in large part on the health of our diverse array of chapters. Healthy chapters mean a strong membership pipeline, a higher level of artistry and musical credibility. For the majority of our members, the local BHS Chapter is the single most significant point of contact with the Society.

For this reason, and in partnership with Harmony Foundation International, we've created the Barbershop Harmony Society's Healthy Chapter Initiative.

This curriculum is a product of the BHS Healthy Chapter Initiative created and designed through the BHS Leadership Operations Project Team (LOPT).

For more information about the Healthy Chapter Initiative visit: www.barbershop.org/healthychapters

Society Chapter Leadership & Education team, email us at chapters@barbershop.org or call 800.876.7464

Curriculum Learning Objectives

- Learn the 4 step plan for succession planning
- Develop positive attributes
- Identify potential candidates
- Evaluate candidate with matrix
- Develop a go forward plan

Succession and Leadership

The true measure of success for any leader is not financial stability, or technical expertise, or beautiful administrative systems. **It is the ability of the team you built and leave behind that will keep the organization vital.**

Succession is an exercise of metrics married to hope. The metrics are the data that you collect on the capability of the people and the hope is that capable people will be able to adjust to the changing times of the organization.

Succession therefore is a purposeful activity that starts with an understanding of the possible future of the organization and the strengths of the individuals in the organization.

Questions about the future:

What will the organization be doing in the future?

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What strengths are needed for that future?

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What must we do now to prepare for the future?

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MY NOTES:

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Building the Plan

The following 4 step plan will help you with the purposeful aspects of succession planning:

Step One: Develop the Position Attributes—"the shopping list"

Step Two: Identify Potential Candidates

Step Three: Compare Candidates to Attributes

Step Four: Analyse Results and Develop the Plan

Each step will be described with possible forms to assist with the Succession Plan.

Step One: Position Attributes

Given the future of the organization, develop a list of characteristics, skills and guiding principles that the ideal candidate should demonstrate. This is a shopping list that could be organized into three areas:

Technical

Interpersonal

Organizational

Once the list is created, rank the importance of the characteristics using "A" for absolute, "B" for beneficial, and "C" for convenient. When you identify and "A", you are saying that the candidate could be eliminated because the absence of the item is crucial to their success.

Technical • • • •	Rank: A, B, C
Interpersonal • • • • • •	Rank: A, B, C
Organizational • • • • •	Rank: A, B, C

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Step Two: Search

Begin to look at every level of the organization and view each person through the attributes list. Really look at people. Many organizations have selected individuals that have get the job rather than those who can actually do the job. Those with "sizzle" but no "steak" are often harmful to the organization.

Get the Job (High)	Low – Can Do the Job – High	
	• Poor choice • All sizzle • 25% of the time selected	• Capable, great choice • Obvious • Usually selected
	• Do not touch	• Would do a good job • Usually not hired • Is a mistake
Get the Job (Low)	Low – Can Do the Job – High	

Perhaps a special project could be assigned to ensure that the candidate is capable.

Top candidates may not have all of the right skills but make up for it in self motivation, leadership, tenacity and vision.

Step Three: Evaluate

Use methods that are reliable and easily available to evaluate candidates. Special projects is one of the best methods for understanding a candidates capability. The following three pages provides a method of evaluating results.

Factors	Level 1 Unqualified	Level 2 Less Qualified	Level 3 Fully Qualified	Level 4 Highly Qualified	Level 5 Superstar
1) Technical	• Can't do the work • Incompetent • Below minimum	• Can do the work but needs training and supervision	• Can do the work very well • An asset	• Does more than required • Does it better and faster	• Leader in the field • Sets the bar • Very clear and insightful
2) Motivated To Do The Work	• Passive • Doesn't want to do the work	• Will do the work if pushed • Not a good fit for work	• Motivated to do the work with little prompting	• Takes initiative to do more, faster, better • Looks for work	• Totally committed to do whatever it takes to do the job
3) Team Skills (EQ)	• Uncooperative • Negative • Hides problems	• Will cooperate if asked • Needs urging to be involved	• Fully cooperates with others without urging • Deals with conflict	• Takes initiative to help others • Persuades, motivates	• Inspires, coaches, minimizes conflicts
4) Problem Solving	• No understanding of key issues • No solutions developed	• Needs support • Understands basic issues • Weak solutions	• Clearly understands all key issues • Develops good solutions	• Quickly understands • Develops multiple solutions	• Understands all issues • Optimizes resources
5) Achieve Results	• Totally mismatched experience and results	• Some comparable accomplishments • Needs extra training	• Has handled projects with good results	• Environment and projects match with better results	• Scope, span and scale match with excellent results

Step Three: Evaluate

Factors	Level 1	Level 2	Level 3	Level 4	Level 5
6) Planning and Executing	• Unorganized • Weak • Very reactive • Wastes time	• Reactive • Misses deadlines • Plans when pushed	• Consistent planner • Meets deadlines • Organizes and prioritizes	• Always plans, anticipates, prioritizes, and beats deadlines	• Superb, anticipates every-thing • Sees big picture and all issues
7) Environment & Culture Fit	• Complete mismatch of culture and environment	• Reasonable match on culture and environment, not a perfect fit	• Close match on people, pace, approach, & organizational structure	• Has been successful in this type of culture and organization	• Thrives in this type of environment and culture • Great success
8) Growth Trends	• No personal or business growth noted • Makes excuses	• Flat trend • Capable but needs to be pushed to grow	• Growth trend shows positive growth pattern	• Strong upward growth trend • Consistently does more	• Great upward trend • Great progress supported by results
9) Character & Values	• Questionable character • Job does not fit values	• Somewhat fits values and needs • Will be distracted	• Strong fit with values and moti-vational needs	• Clearly fits • Values and needs principled	• Strongly committed with great character • Role model
10) Potential	• Position is over candidate's head	• Can handle the position but not likely to grow beyond it	• Can handle all key parts and has an upside	• Will make a quick impact and has near term upside	• Will make a great impact with potential to move up quickly

Step Three: Evaluate

Factors	Level 1 Unqualified	Level 2 Less Qualified	Level 3 Fully Qualified	Level 4 Highly Qualified	Level 5 Superstar
Summary	• Incompetent • Unmotivated • Uncooperative • Distracted • De-motivated • Reactive	• Needs extra training and pushing • Needs urging • Avoids • Is too neutral • Passive	• Meets high stand-ards • Self motivated • Fully cooperative • A contributor • An asset • On top of issues	• Does it better • Does more faster • Initiates helping • Training is sought out • Influences others • Anticipates issues	• Sets standards • Fully committed • Proactively coaches • Is asked to lead • Motivates others • Forward thinking •
Comments					
Next Steps					

Step Four: Development Plan

Position: Name Development Needed Candidates ready now:	• •	
Candidates ready in 12 months:	• • •	
Candidates ready in 24 months:	• • •	

Action Plan

Identify the following:

- Key positions in your organization requiring a successor

- Identify the urgency for the search

- Develop a list of the future skills needed

- Use the 4-step plan to succeed with succession

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