



Succession Planning

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Objectives:

- Strategies for successful transitions
- Tools for next step preparation
- Enhancing work place outcomes



Overview

- What is succession planning?
 - Formal
 - Selected participants
 - Structured plan
 - Informal
 - Self selecting
 - Flexible transition



Personal Experience

- Quasi structured
 - Co-Directors – new department
 - Responsibility assignment
 - Co-mingling of different departmental staff
 - Creating efficiencies
 - Smooth transition from Pre to Post
 - Timely issuance of subagreements
 - Cross Training



Communicaton

- Communication styles
 - Challenges
 - Critical thinking
 - Good cop v. bad cop
 - Staff Meetings
 - Agendas
 - Retreat
 - Team building



Transition Period

- Staffing
 - Gaining trust again
 - Discuss transition plan
 - Staff transition – internal
 - Staff transition – external
 - Outside agencies



Transfer of Information

- Cross Training – and more...
 - Daily meetings
 - Establish a timetable for sharing
 - Exchange of information
 - Agenda of topics
 - Questions
 - Resolve unclear issues
 - Purging of information
 - Cleaning out the office



Easing in and out

- Daily Meetings
 - Old versus new processes
 - Metrics – best practices
 - Personal Sharing
- Celebration Activities
- Cohesive Transaction
 - Discuss “style”



Final Thoughts

- Lay ground work early
- Use all tools available
- Explore best practices
- Develop contacts
- Communicate

Thank you! – Questions?

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