

BIG RIVER
Group, LLC

Research, "Chainsaw Planning"[®] & Training

P.O. Box 5120 • St. Cloud, MN 56302-5120 • (800) 500-7017 • Fax (320) 202-1010 • www.bigrivergroup.com

Minnesota Family Support and Recovery Council
October 2, 2017 • St. Cloud, MN • 2:45 to 4:15 PM
Waaaaay Better Succession Planning

1) Where do you need to start, or improve Succession Planning?

2) How might you use...

A) Goals & Responsibilities?

(pages 1-5)

B) Talent Development Worksheet?

(pages 6- 7)

C) Succession Worksheet?

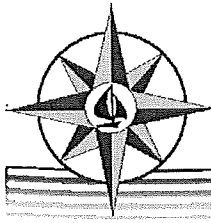
(page 8)

D) Skills & Training Inventory?

(page 9)

THE PERFORMANCE /POTENTIAL MATRIX

<p>High Professional</p> <p>Consistently produces exceptional results and receives high performance ratings in a defined but focused area. Knows current job extremely well. Does not always easily adapt to new situations, particularly those outside of his/her functional area. Cell occupants are very valuable to the organization. May be promotable within functional/technical area.</p>	<p>High Professional Plus</p> <p>Consistently produces exceptional results and receives high performance ratings. Is particularly good in one or more areas like businesses, geographies, functions or specialized skills. Can adapt to new situations and learn new areas. May be promotable in multiple functional/technical areas or general management.</p>	<p>Consistent Star</p> <p>The best there is and the best you have. Typically in n short supply but in high demand. Performs well in almost everything he/she takes on. Learns fast. Transfers learning from one area to another. Resourceful. Gets things done under tight deadlines and resources. Has the ability to take on major stretch assignments in new areas with promotions and lateral movement into just about any situation.</p>
<p>Solid Professional</p> <p>Consistently meets and may occasionally exceed expectations. Knows current job well. Does not effectively adapt to new situations. Has a narrow bandwidth in terms of professional interests.</p>	<p>Key Performer (Utility Player)</p> <p>Meets the expectations of the role. Understands and knows the current job well and enhances skills for their current job as well as the near term future. Can adapt to new situations and challenges as necessary. Comfortably assumes new jobs and roles and performs well in them in time. Probably promotable a level vertically or could move laterally within the organization.</p>	<p>Future Star</p> <p>Consistently meets and sometimes exceeds expectations and has the capacity to take on new and different challenges on a consistent basis. Addresses new challenges and issues with ease. Quickly gets up to speed when taking on a new assignment. Has the potential to make career changes into different situations.</p>
<p>Lower Performer</p> <p>Is not delivering results as expected and cannot effectively adapt to new and different situations. This is the least valued cell in terms of ROI. Occupants of this cell may require performance action.</p>	<p>Inconsistent Performer (Future Utility Player)</p> <p>Has some potential to do more but has not yet fully demonstrated it. Is not meeting performance standards applied to others in the organization and as a result, is struggling. May be new to the job or to the company. May be in the wrong job or function.</p>	<p>Diamond in the Rough</p> <p>Occupants of Cell 6 are truly High Potentials. Most would agree that they have the potential to perform and do great things for the organization. They have potential but as the word suggests, the actual playing out of the potential is in the future. They have either not had sufficient time or opportunities to demonstrate what they can do or have been inconsistent in the past. Some may have had one or more significant stumbles recently but people still think they have the potential to break out and be a significant contributor. May be in the wrong job or a poor fit for the current situation.</p>



Chainsaw Planning® Worksheet #3: Vision & Priorities

Step #1: Write items for your new Vision here.

In five years, we will have developed, delivered, & be recognized for...

-
-
-
-
-
-

Step #2: Identify between 4 & 6 near-term Priorities to get there.

1)

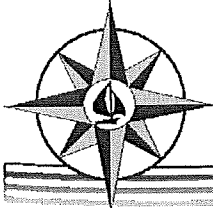
2)

3)

4)

5) *(Optional)*

6) *(Optional)*



Chainsaw Planning® Worksheet 4B

Benchmarks for:

1) What do you want completed? (*New Goal*)

2) How should the employee begin? (*Info Needed or Action Steps*)

3) What should you see happening to indicate progress? (*Benchmarks*)

(Dist, School, or Program)

(Today's Date)

Start & End Dates For Tasks

1)

2)

3)

4)

5)

6)

Employees, Teams, or Departments

Priority 1:

30-day Product:

1)

2)

3)

4)

5)

6)

Priority 2:

30-day Product:

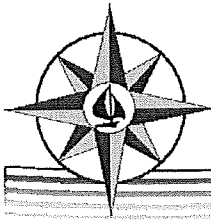
Project Notes:

1)

2)

3)

4)



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(Organization) • (Date) • (Time & Location)
Three Types of Future Work

Implementing
(Priorities - Few Items)

Reviewing
(Items to Study)

Considering
(Other Items)

1)

*

*

2)

*

*

3)

*

*

4)

*

*

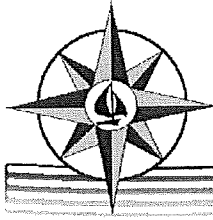
5)

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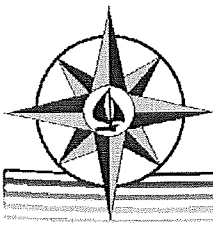
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Hard & Soft Skills for: _____

<i>Desired Hard Skills</i>	<i>Desired Soft Skills</i>



Development Plan for:

Date:

Section 1: Specific Growth Goals

- 1)
- 2)

Section 2: Knowledge & Experiences to be Developed

<u>Knowledge & Training Needed</u>	2A: <u>Within Profession</u>	2B: <u>Within Our Organization</u>
	•	•
	•	•
	•	•
	•	•

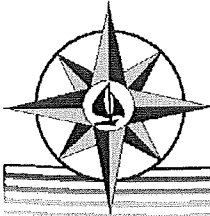
<u>Experience Needed</u>	2C: <u>Within Profession</u>	2D: <u>Within Our Organization</u>
	•	•
	•	•
	•	•
	•	•

Section 3: Other Possible Growth Areas or Resources

-
-
-

Section 4: Possible Nonprofit Time & Talent

-
-



Succession Plan for:

Date:

Section 1: Short-Term & Long-Term Succession

1A) Short-term, This Person Could Step in For These Leaders:

- | | |
|----------|------------|
| A) Name: | Key Tasks: |
| B) Name: | Key Tasks: |
| C) Name: | Key Tasks: |

1B) Short-term, These People Could Step in For This Person:

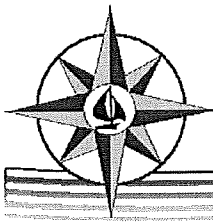
- | | |
|----------|------------|
| A) Name: | Key Tasks: |
| B) Name: | Key Tasks: |
| C) Name: | Key Tasks: |

1C) Long Term: Employees to be Developed to Replace This Person:

- A)
- B)
- C)

1D) Long Term: This Person Can be Developed to Replace These Leaders:

- A)
- B)
- C)



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1) What was good & productive about this session?

2) What was your biggest discovery?

3) How would you improve this session?

4) Please check if any apply:

_____ I would like to have further training in this area (for others or myself).

_____ I know of others who could use your services as either a speaker or consultant.
_____ It's ok that you call me for more information.

_____ Please call me to discuss a situation.

Name _____ Email _____

Organization _____ Phone _____