Needs Analysis for Succession Planning
<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
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</thead>
<tbody>
<tr>
<td>7H30</td>
<td>Welcome</td>
</tr>
<tr>
<td>7H40 - 8h00</td>
<td>Breakfast</td>
</tr>
<tr>
<td>8h00 - 8H30</td>
<td>Needs Analysis</td>
</tr>
<tr>
<td>8H30-9h00</td>
<td>Legislation</td>
</tr>
<tr>
<td>9H00 - 9H15</td>
<td>Tea and Coffee</td>
</tr>
<tr>
<td>9H15 - 9H45</td>
<td>Succession Planning</td>
</tr>
<tr>
<td>9H45 - 10H00</td>
<td>Questions and Answers</td>
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<tr>
<td>10H00</td>
<td>Close of workshop</td>
</tr>
</tbody>
</table>
Needs Analysis 101

Phase 1
Aligning Job Descriptions to Organisational Culture

Phase 2
Developing of Ideal Competency Profile using the Aligned Job Description

Phase 3
Auditing of Each Individual Against the Developed Competency Profile for Each Job (Skills Audit)

Phase 4
Skills Gap Analysis and Consolidation into Results into a Three Year Training Plan and Leadership Development
# Skills Audit

## A. NQF Assessment
- Needs - aligned to strategic plan
- Cluster & prioritise needs
- Identify appropriate providers & solutions
- Budget requirements
- Legislation/Policy

## B. PDP Evaluation
- Integrated assessment against defined outcomes
- Employees complete info. on structured PDP form
- Managers & employee reps. Have evaluation meetings

## C. Group Evaluation
- Occupation competences listed and tracked

## D. Matrix / Profile
- Managers evaluate needs independently

## E. Feedback
- How?
- Who?
- When?
- Why?
- Reports?
- Tools?

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### How?
- Integrated assessment against defined outcomes
- Employees complete info. on structured PDP form
- Managers & employee reps. Have evaluation meetings
- Occupation competences listed and tracked
- Managers evaluate needs independently
## Analysis Reporting

<table>
<thead>
<tr>
<th>No.</th>
<th>Strengths Identified</th>
<th>Weakness/Gaps Identified</th>
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</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
<td></td>
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<tr>
<td>2.</td>
<td></td>
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<tr>
<td>3.</td>
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<tr>
<td>4.</td>
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<tr>
<td>5.</td>
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<td>7.</td>
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### No. of Members with High or Very High Skills

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<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
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<tbody>
<tr>
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<td>3</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>6</td>
<td>4</td>
<td>3</td>
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<tr>
<td>Very High</td>
<td>3</td>
<td>4</td>
<td>2</td>
<td>4</td>
<td>2</td>
<td>7</td>
<td>3</td>
<td>1</td>
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</table>

<table>
<thead>
<tr>
<th>No.</th>
<th>John Smith</th>
<th>Peter Jones</th>
<th>Jane Johnson</th>
<th>Karl Brown</th>
<th>Sarah Osborne</th>
<th>Nigel Smith</th>
<th>Michelle Sawyers</th>
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<tbody>
<tr>
<td>1</td>
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<td>✗</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>✓</td>
<td>✗</td>
<td></td>
<td>✗</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>✗</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>✗</td>
<td>✗</td>
<td></td>
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</tr>
<tr>
<td>5</td>
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<tr>
<td>6</td>
<td>✗</td>
<td>✓</td>
<td>✓</td>
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<tr>
<td>7</td>
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</tbody>
</table>

- ✓: High
- ✗: Low
Succession planning is a process for identifying and developing internal people with the potential to fill key business leadership positions in the company. Succession planning increases the availability of experienced and capable employees that are prepared to assume these roles as they become available. Fundamental to the succession-management process is an underlying philosophy that argues that top talent in the corporation must be managed for the greater good of the enterprise.

Effective succession or talent-pool management concerns itself with building a series of feeder groups up and down the entire leadership pipeline or progression (Charan, Drotter, Noel, 2001).
Succession Planning in the Context of Human Capital Planning

Recruitment and Selection
Attracting employees with the right talent mix and creating interest in the organization

Retention
Encouraging successful employees to continue engaging their talent and commitment to the organization

Succession Planning
Identifying key positions, critical talent, and development options to facilitate the appropriate development and placement of successors

Assessment and Performance Management
Identifying and measuring criteria to select successful leaders and evaluate their performance/potential

Development
Providing ongoing learning opportunities via training, experience, and/or or feedback to enhance individual knowledge or skill in leading others
Succession planning is not a new phenomenon. Companies have been wrestling with ways to identify, develop, and retain their talent for decades.

Today’s organizations are facing higher demands in a global market with the retirement of the Baby Boomers and the widening skills gap.

In order to achieve results, companies need to start with the basics, do a proper needs analysis and skills audit, create a strong process and then invest in the tools and technology to instil a talent development mind-set in their organization.
This sample grid shows how organizations can use the succession planning process to spot emerging leaders and groom them for future leadership roles. Candidates C, G, and I show the most potential for leadership success; the organization should immediately invest in their leadership development. Candidates B, F, and J show high potential for leadership success but need additional support or training to boost their performance in their current roles. Candidates A and D, in contrast, shine in their present jobs; these strong performers can make their best contributions to the organization by remaining in their current roles. And candidates E and H, who have low leadership potential, are also struggling in their present jobs; the organization should consider moving them to a position that better fits their skills, abilities, and talents.

Note: 1Current Performance should compare people in similar functional roles.

Source: Gallup

Graphic by Tommy McCall
Needs Analysis for Succession Planning

- Research indicates that clear objectives are critical to establishing effective succession planning.
- These objectives tend to be core to many or most companies that have well-established practices:
  - Identify those with the potential to assume greater responsibility
  - Do proper needs analysis and skills audits
  - Provide critical development experiences to those that can move into key roles
  - Engage the leadership in supporting the development of high-potential leaders
  - Build a data base that can be used to make better staffing decisions for key jobs
  - Meet the career development expectations of existing employees
Scenario for Succession Planning

THE SCENARIO DEVELOPMENT PROCESS

Define Focal Issue, Question, or Decision and Relevant Timeframe
Review Past Events & Alternative Interpretations

Identify Driving Forces
Identify Critical Uncertainties
Develop Plausible Scenarios
Discuss Implications & Paths
ReCr8 your Thinking

• Use your Skills Audits and Needs Analysis for Performance Management
• Use the Skills Audit and Needs Analysis Reports to populate your Succession Plans
• Think about skilling the country not the company (you can always get them back)
Thank you...

Educators & Trainers: Career Recognition!

Qualify for a two-year Level 5 National Diploma in OD-ETD Practices through RPL!

Offering an online gap analysis pre-assessment and comprehensive toolkit and portfolio, assessment, certification and graduation, while facilitated workshops guide and support candidates to Recognition of Prior Learning (RPL).