



# SUCCESSION PLANNING



## WHAT IT IS

★★ **AND** ★★

## WHAT IT ISN'T



A company's workforce is a living, breathing, constantly changing thing. Though the name on the front of the building remains the same, the group of people that keeps it up and running doesn't. And that's why succession planning is so important for the continued success of any organization.

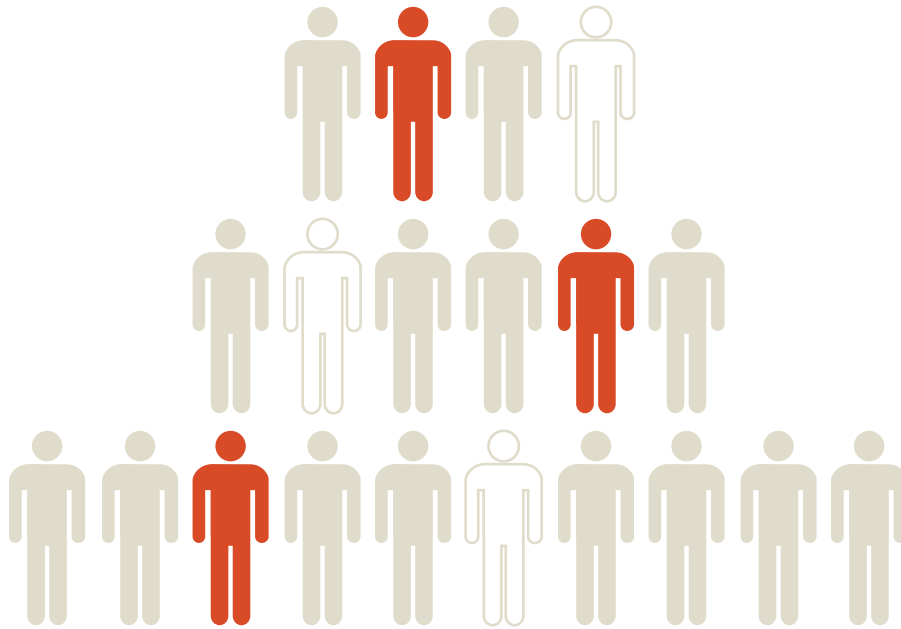
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Executing an effective succession plan, however, is no simple task.  
First, you have to have a firm grasp on what succession planning is and isn't.

# WHAT IT IS

## Succession planning is part of organisational planning.

Your organisational structure should be evaluated on a regular basis to make sure it can effectively handle the business's workload. While doing this, keep an eye out for employees nearing retirement, flight and termination risks, and other signs that workforce change is on the horizon.



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"Succession planning is taking a proactive approach to employee change at key positions within the company," says Eric Kilponen, manager of marketing and sales operations at Insperty® Performance and Organisational Management. "If you're not preparing to fill these inevitable vacancies, you're already behind."

*"Effective succession planning can turn a brick wall into a speed bump."*

## WHAT IT IS

### A succession plan is a catalyst for leadership development.

Identifying strong candidates for leadership roles is just the first step. To realize their full potential, these hopefuls must have resources that allow them to develop the skills needed to fit into those crucial roles and succeed.



This focus on developing high performers to take on high-level positions can have a great effect on office morale, as employees feel like the company is invested in their professional growth. Engaging executives in the process gives them a voice in the matter. This creates buy-in and support for the plan while keeping everyone in the loop.

# WHAT IT IS

## Succession planning is easier with a potent organisational chart.

Stocked with all the metrics needed to identify your company's key players – i.e., performance rating, salary and tenure – a good organisational chart points the way when it comes to succession planning.



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"With an organisational charting program, companies can pull relevant data from multiple sources and centralize it," says Kilponen. "That way, leaders can easily identify and track the progress of employees within their succession plan profiles, empowering them to make better hiring and staffing decisions."

# WHAT IT ISN'T

## A succession plan isn't a disaster recovery plan.

Rushed, chaotic, uncertain, reluctant – these words should never describe your succession plan in action. **Remember: Succession planning is proactive, not reactive.** Rather than bracing for impact, your company should be confidently pushing through it.



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Predicting when key employees are going to leave the company is like predicting the weather. However, planning for multiple outcomes at different levels of the organization helps you face these challenging times with excitement instead of trepidation.

# WHAT IT ISN'T

## Succession planning isn't a one-time thing.

Succession planning is all about managing the ever-present change experienced by your workforce. It makes sense, then, that the plan itself will undergo just as much change.

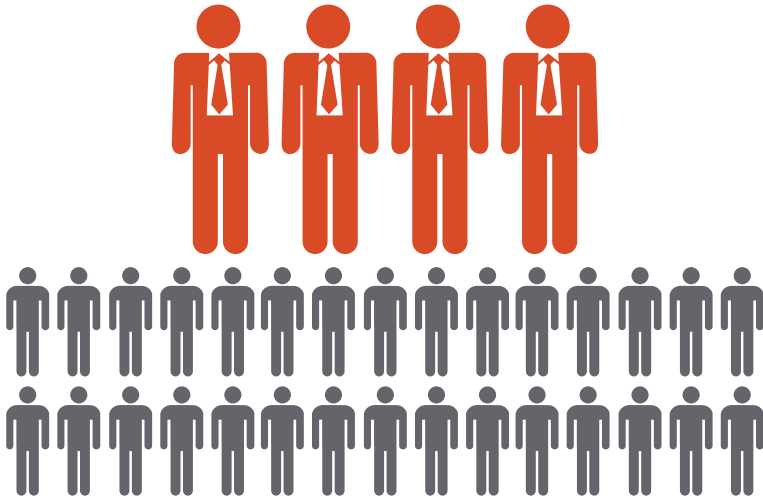


“Something’s amiss if you feel like your succession plan is good enough to put aside,” says Kilponen. “There’s always a way to make your succession plan better, always a way to put it to work for the betterment of the organization.”

# WHAT IT ISN'T

## Succession planning isn't reserved for the top of the org chart.

Perhaps the biggest misconception about succession planning is that it applies only to C-level positions. But if a position at the top is filled with an internal candidate, who fills that person's former position? Identifying candidates for key positions at every level of the organization makes your succession plan more comprehensive and therefore stronger.



Additionally, succession planning is no place for favoritism, nepotism or any other form of bias. In other words, it's not a popularity contest. Important business decisions, such as those involved in effective succession planning, should be based on merits, not genetics.





## Organizational Planning Tools Can Help

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### OrgPlus® 2012

Organize, visualize and strategize your business

OrgPlus 2012 allows companies to easily view their organizational structure and make more informed decisions using dynamic, professional org charts and best-practice analytics.

#### Features

- Boardroom-quality charts with insightful workforce analysis tools to reveal key metrics
- Drag-and-drop functionality to plan organizational change and optimize your workforce
- A wide variety of publication options, including Word, HTML or navigable PDF and PowerPoint documents
- Standard, Professional and Premium editions to meet the needs of any small or medium-sized business

The Altula team is here to help you with all of your OrgPlus needs. Please contact us if you need help with anything related to OrgPlus – technical support, training needs, specific product questions, additional licenses, upgrading to the latest version or anything at all.

We encourage you to attend our OrgPlus webinar, Easily build accurate and attractive org charts, held every other Tuesday. In just thirty minutes, learn how to build boardroom quality org charts that efficiently communicate organizational information and help organize your team to increase productivity and profitability. [Please register here](#)

Additionally, these [videos](#) illustrate how OrgPlus makes chart building nearly effortless.

Get more information at [altula.com](http://altula.com)  
or call us at **877-908-2113**.

## About Altula

Altula helps organisations achieve business harmony by delivering world-class software to organize and strategize today and into the future. We are the exclusive international distributor of OrgPlus, the world's best-selling organisational charting and planning software. We provide sales and support to OrgPlus resellers and customers anywhere outside the United States.

To find out more or learn how Altula can help your company, call us at **877-908-2113**.



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