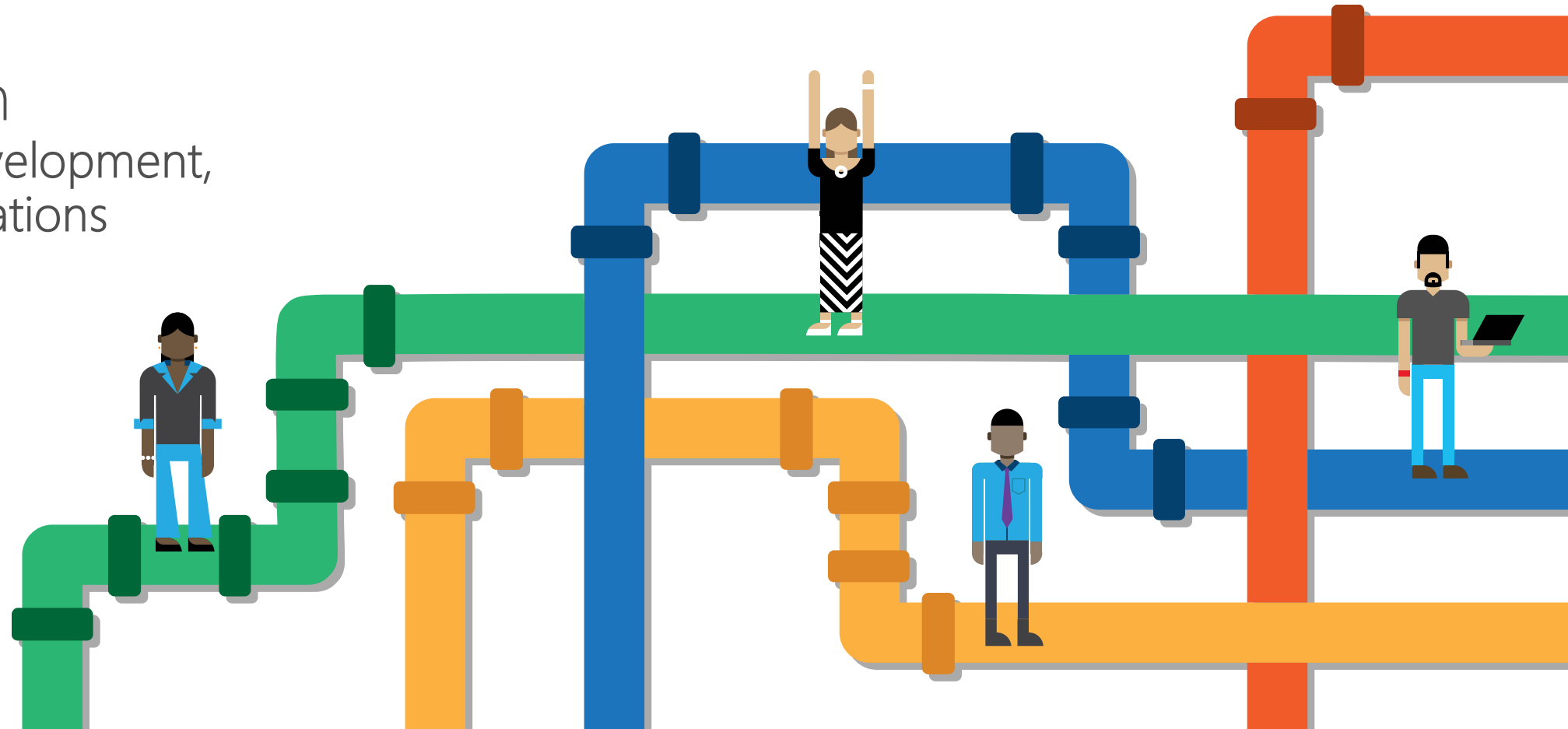


M&O	Blue square	Starburst icon
Leader	Blue square	Starburst icon
Potential and	Light blue square	Light green square
Development	Light blue square	Light green square

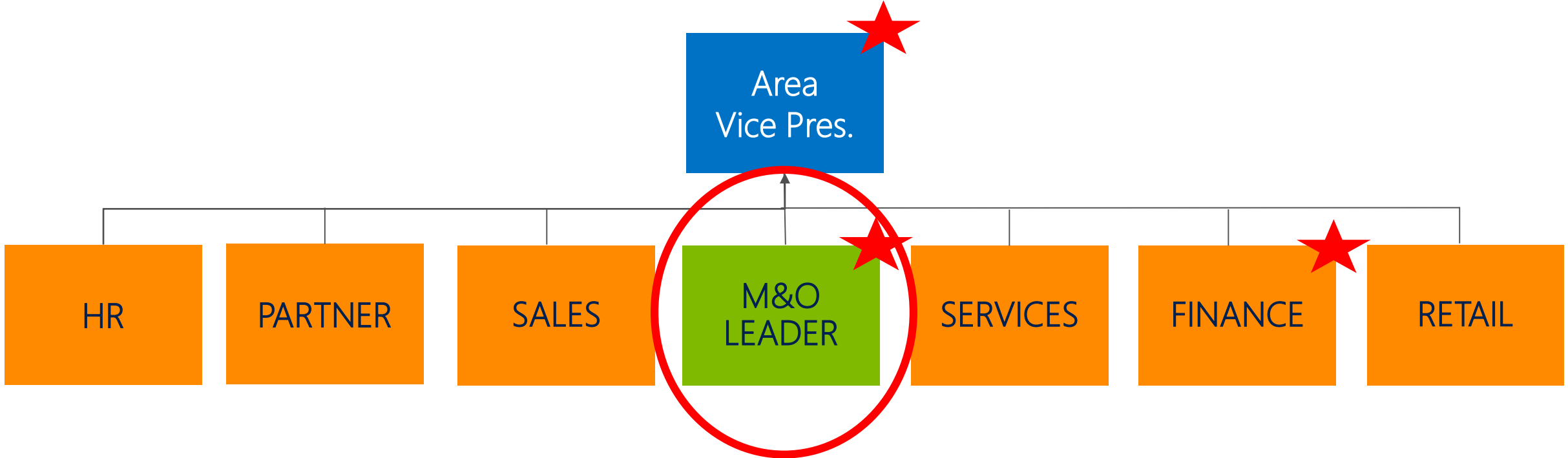
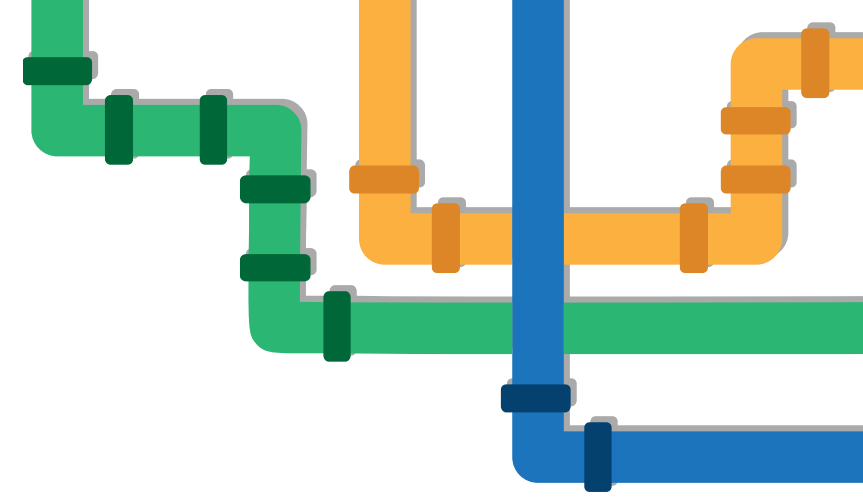
Accelerating talent development

Helena Gilman
Director, Talent Development,
Marketing & Operations



Organization structure

Marketing & Operations
(M&O)



Succession plan | M&O LEADER, Western Europe

Sean O'Brien M&O LEAD, Western Europe			
Ready Now	Emily Davidson SR DIR FINANCE CANADA 1	Sean Wilson Central Marketing Lead 2	Isabell Martin DIR SUB BG LEAD, UK 3
	James Watson M&O LEAD GULF HQ 4	Barry Bonds EPG Lead, Canada 5	Cherise Chase Sub BG Lead WE 6
Ready 1-3 Years	Henrik Stenson DIR SUB BG LEAD 7	Harold Grace DIR CHANNEL SALES 8	Katy Houston CMO 9
Ready 3-5 Years	Scott Vonbergen VP of Business Services Cox Communications +	William O'Brien CMO, Cascade Tech +	Katherine Kline Upstream +
External Candidates			

M&O	■	☀
Leader		
Profile and	■	■
Development		

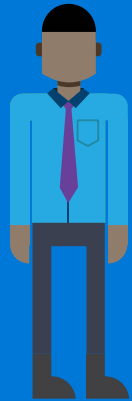
CEB 1: How often does a scenario similar to this happen to you?



Business Situation—Summary

Does this sound familiar?

A strong leader in a key role just gave two weeks notice.



His slate was discussed at the last talent review three months ago.



However, all 'ready now' candidates have moved or aren't available.



You are at square one to fill this critical position...



Managing our talent consistently—Why does it matter?

50%

Leaders 'turn' in next five years

Companies that focus on rigorously managing talent experience...

18%

Higher earnings

26%

Greater revenue per employee

40%

Lower attrition

\$8.4B

Loss in stock market value due to poor succession planning



Talent and succession journey

Benchmarking

- How well are we doing?
- Where do we have opportunities for growth?

Fragmented Replacement Planning

- List of senior level positions
- List of HiPo's
- No development

Traditional Succession Planning

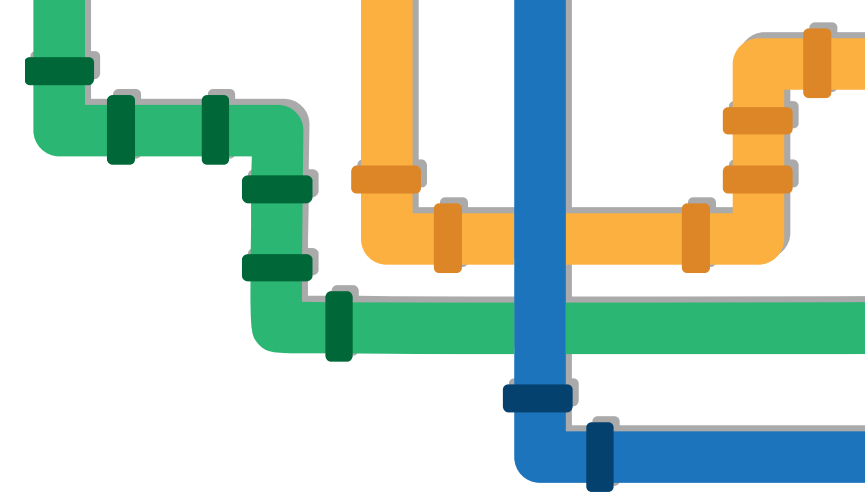
- Key positions
- Talent reviews
- HR driven
- Development plans

Integrated Succession Management

- Business strategy alignment
- Integration
- Enterprise view

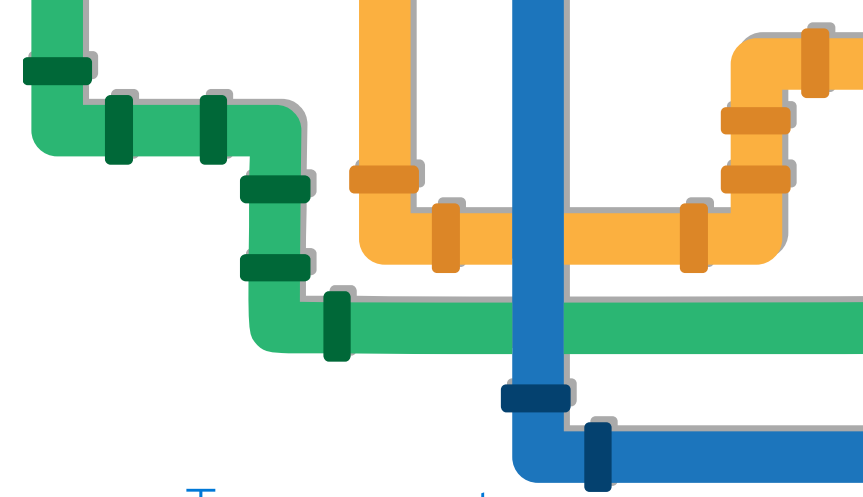
Transparent Talent Mobility

- Pool-based
- Transparent
- Dynamic process
- Movement



Evolution of succession

Levels of maturity



Replacement planning Traditional succession planning Integrated succession management Transparent talent mobility



2009
% of Orgs

15%
of orgs here

52%
operate here

12%
of companies

0%
at time of study

2014
% of Orgs

28%
of orgs here

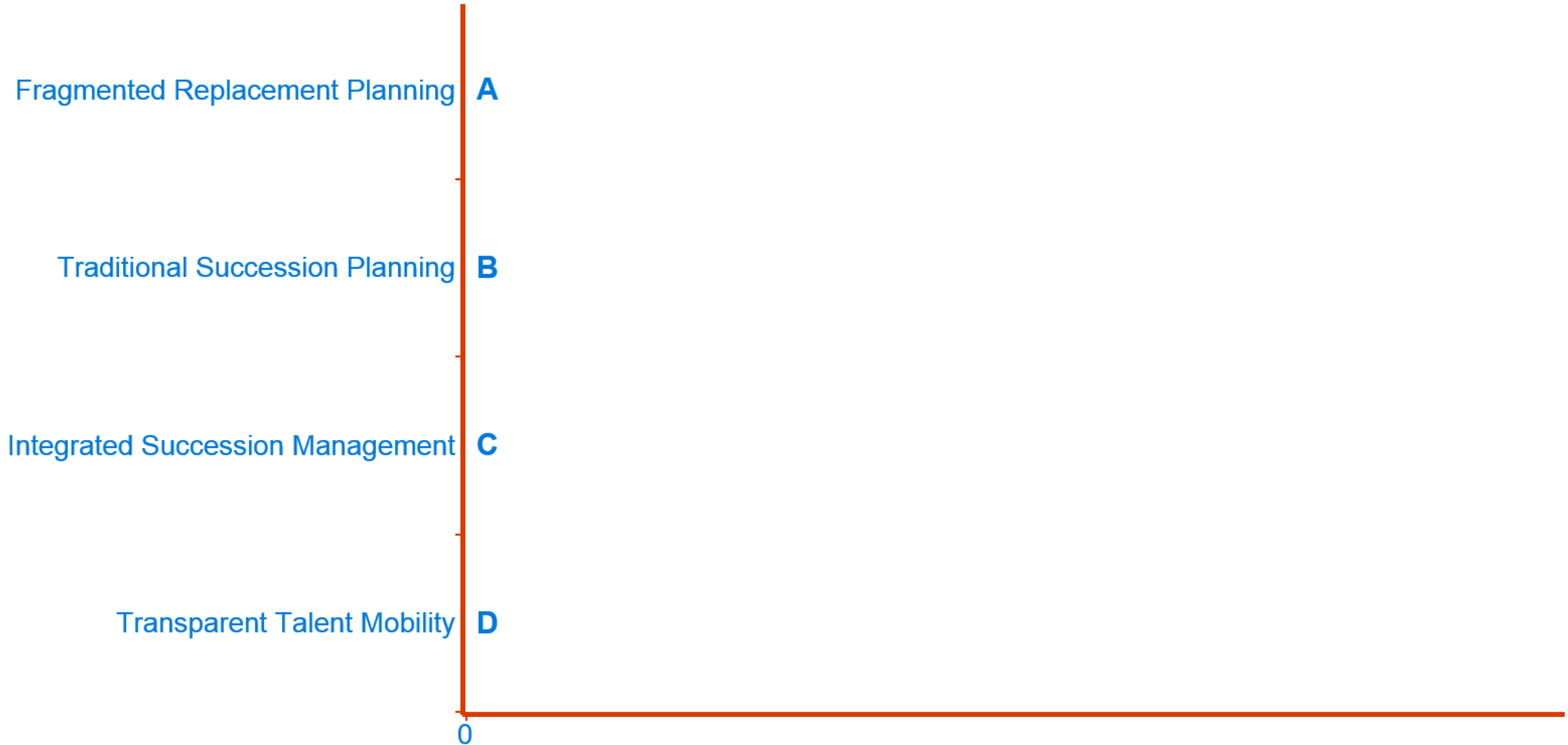
36%
operate here

30.5%
of companies

5.5%
at time of study



CEB 2: How mature would you consider succession management in your company?



Total Results: 0

Desired state

From this...

- Key leadership role is open
- No immediate successors
- Recruiting efforts spin up internally and externally
- 'Acting' lead appointed; who is doubling up current role
- Role remains open 6 months

...to this

- Leadership role opens
- Review 'ready now' pool of candidates
- Conduct interview process
- New leader announced and in role in one month
- Minimal disruption to the business/team

Goal

Looking to the future

Improving the quality and reliability of Leader succession by ensuring that we have an **integrated launch PaD** for the effective development of potential Leaders, resulting in an **improved internal slate**



How did we do it?

Strategy

Identify potential leaders for targeted role

Support them to become 'ready now'

Move them into the designated role

Design principles

Relevant

Transparent

Aligned to Company Career Model

Program

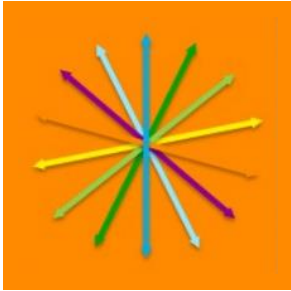
Builds a **strong leadership pipeline**

Increases **rigor and predictability** into the hiring process

Provides **targeted development** experience

Partnership with Sage Ways

What is the LEADER PaD program?



Target Role Profile

Anchored around a clear **Leader Profile** that defines success in the role



Feedforward Readiness Report

Up to four raters provide **feed forward** in a survey that informs participant's development plan Feed forward focuses on looking ahead with concrete development suggestions



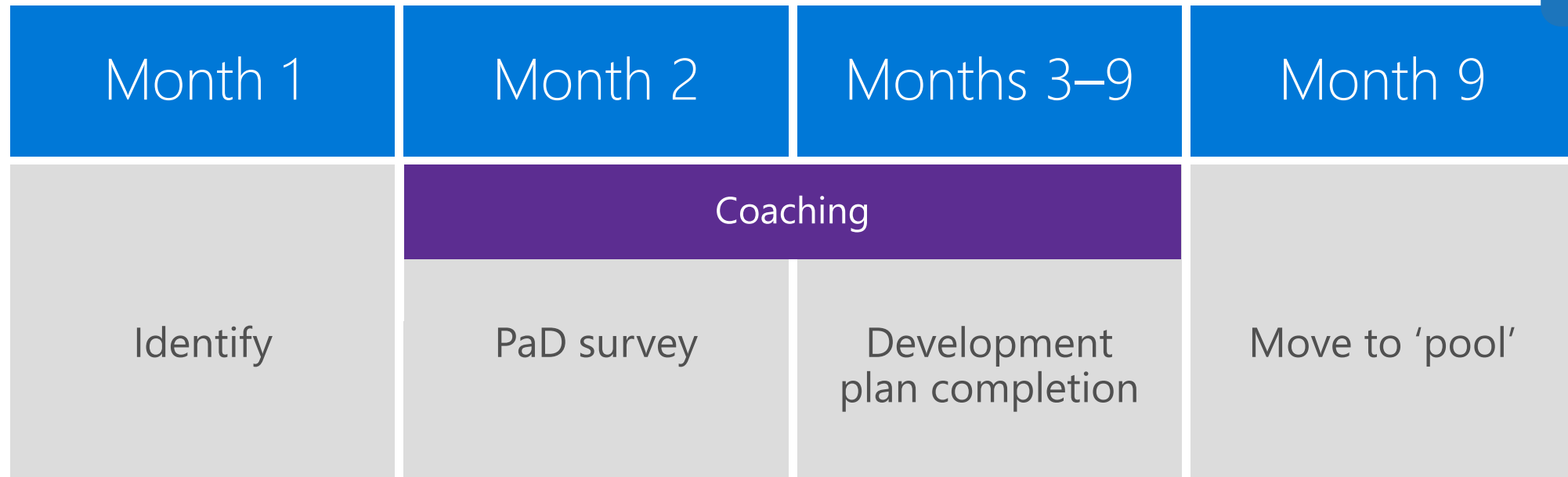
Development Coaching and Planning

Participants are supported by an external **Executive Coach** to reflect on input and shape development plan, which is then shared with Manager and HR



Process and components

Year one



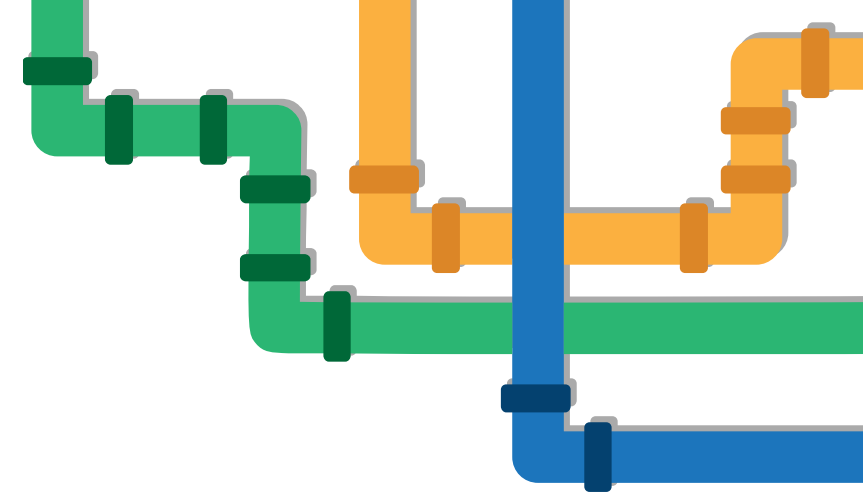
- Potentials approved and informed of nomination

- Readiness Reports provide feed forward

- Feedforward informs development plans

- Potentials move to the pipeline 'pool'

Process and components



Year one

Month 1	Month 2	Months 3–9	Month 9
Identify	Coaching		Move to 'pool'
	PaD survey	Development plan completion	

Year two



Target development profile

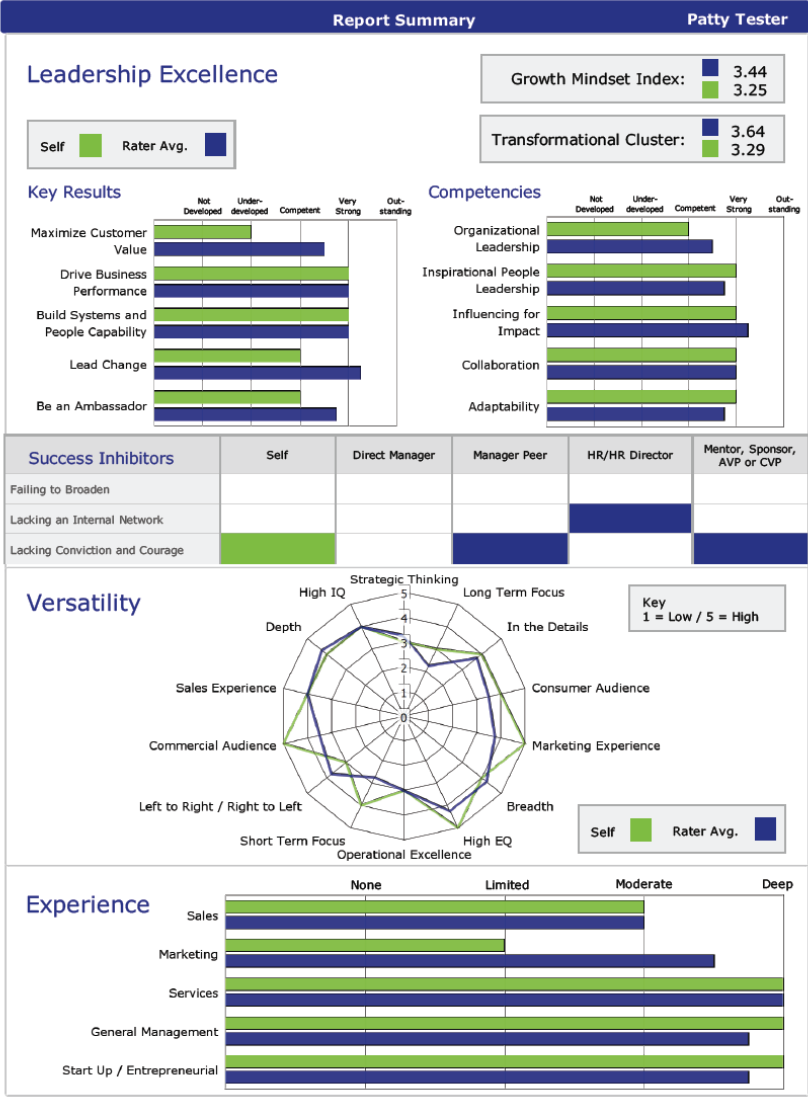


1. Leadership excellence (today)

What=Key results needed
How=Competencies

2. Versatility (future)

3. Experiences (past)



Target development profile

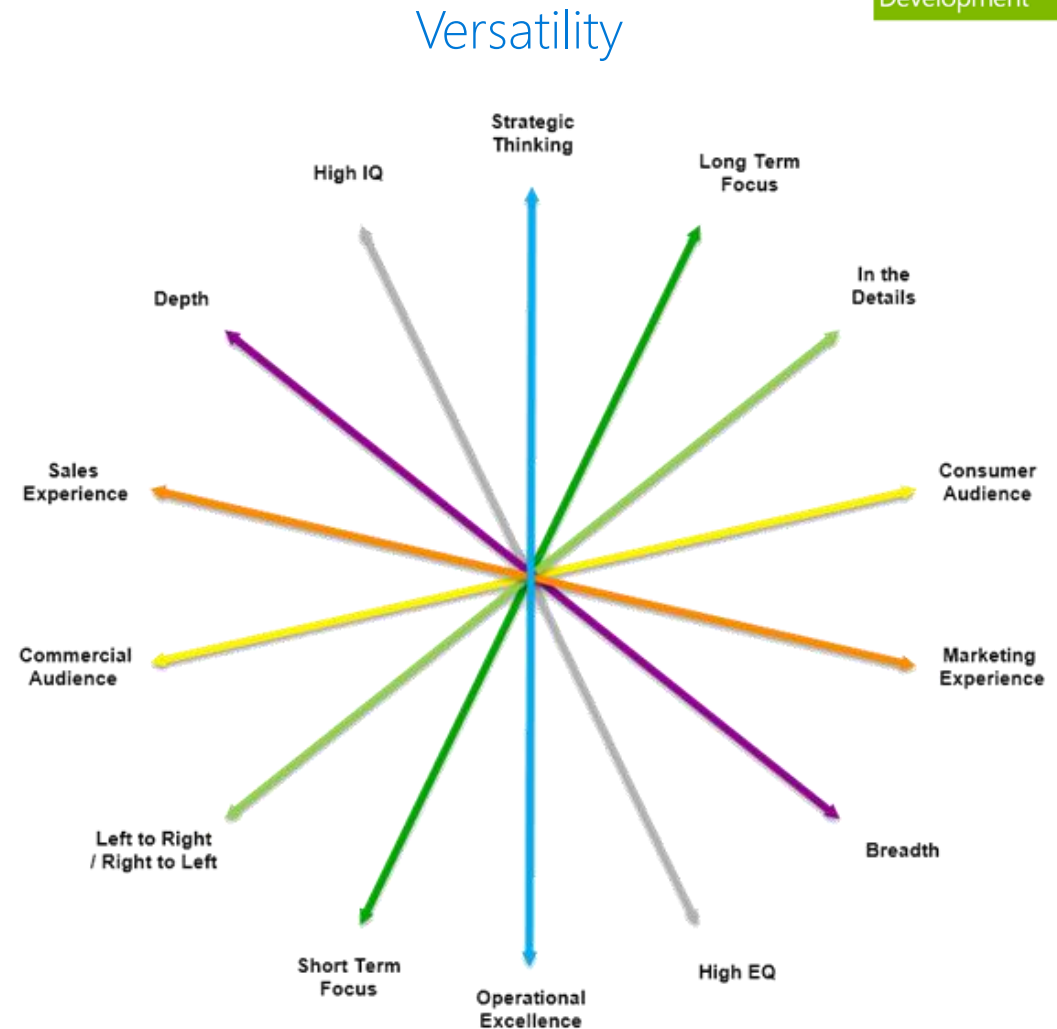


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How=Competencies

2. Versatility (future)

3. Experiences (past)



Feedforward readiness report

Example of written input

Rater X

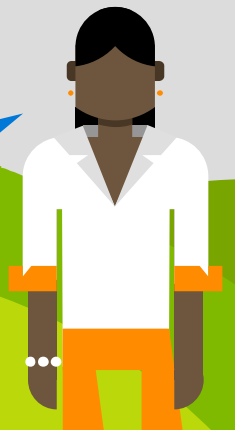
Take more ownership and be in the forefront of leading growth and transformation within the Subsidiary, with our partners and with our customers.

Rater Y

Become an advocate for technology evangelism. Identify initiatives that can help land this within the Subsidiary.

Rater Z

Be more deliberate in leading the sales effort with the teams in the field and help drive the transformational conversations.



Coaching and Development Plan

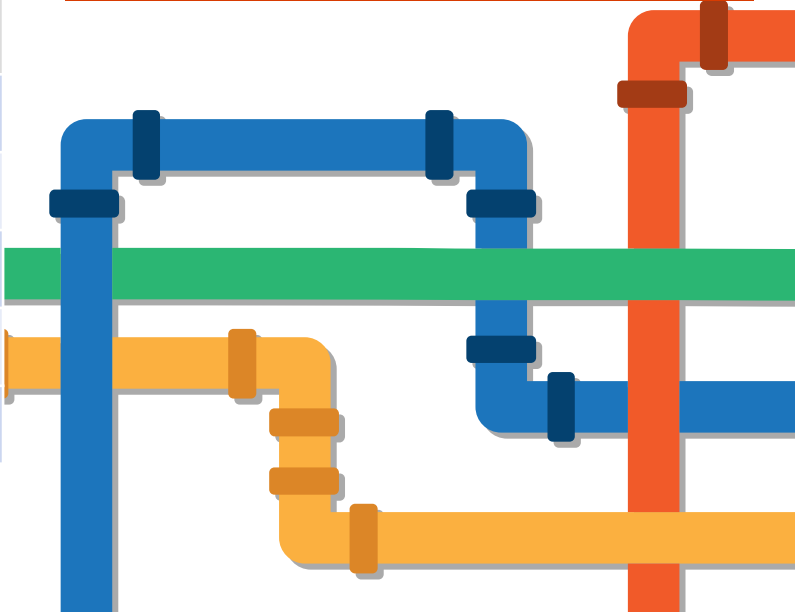
Marketing & Operations Group

Target development plan

Name:		Timeframe:			
Development focus areas	Actions			Metrics: How will I measure my growth and effectiveness?	
From the Summary Sheet (Section I) list 3–5 areas in need of development	Select the learning type that is most relevant for your development at this time (learning on the job, from others, through training)	Select the development suggestions offered in your report and describe the development activities	Target completion date	Status	Desired behaviors and success metrics (more of/less of)

Sample

- Certified external executive coaching
- Six 45 min sessions
- Dev plan sign off by manager, HR and coach



What have we achieved so far?

Measurement

Leader PaD impact

M&O PaD talent pool activity

Moves to target role

Other role moves

Not moved yet

Attrition

Slates

Readiness indicator

Leader PaD feedback

Program and process feedback

Transformational leadership cluster

Growth mindset

Pool early look

Gender analysis

Pool HIPO analysis

60% moved to M&O Leader and New Roles

Target: **60%**

Readiness

Pool: **78% Ready Now**

Participant

Satisfaction: **93%**

Coaching experience

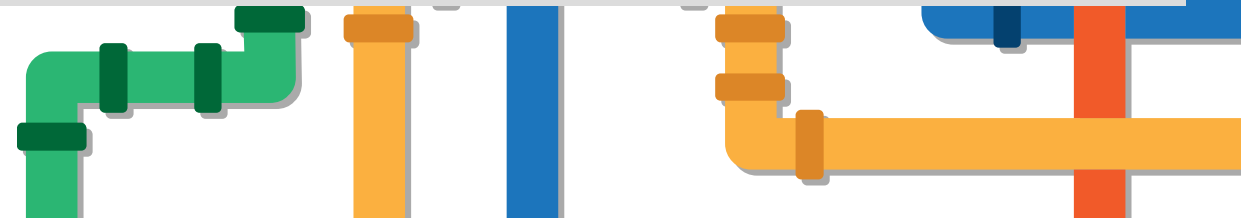
Satisfaction: **99%**

Critical success factors

- Executive engagement and sponsorship
- Role profile clarity
- Quality input, i.e. candidate selection
- Engagement from local HR
- Communications
- Rigor & transparency

Learnings

- We know this—quality in, quality out
- Setting realistic expectations: things change, life happens, role requirements can change
- Integration—company tools
- Adoption—takes time to get everyone onboard with process





Wrap up

Desired state

- New leader announced and in role in 1 month
- Minimal disruption to the business/team

Benefits

- Improved pipeline readiness
- Organizational agility
- Measurable business results

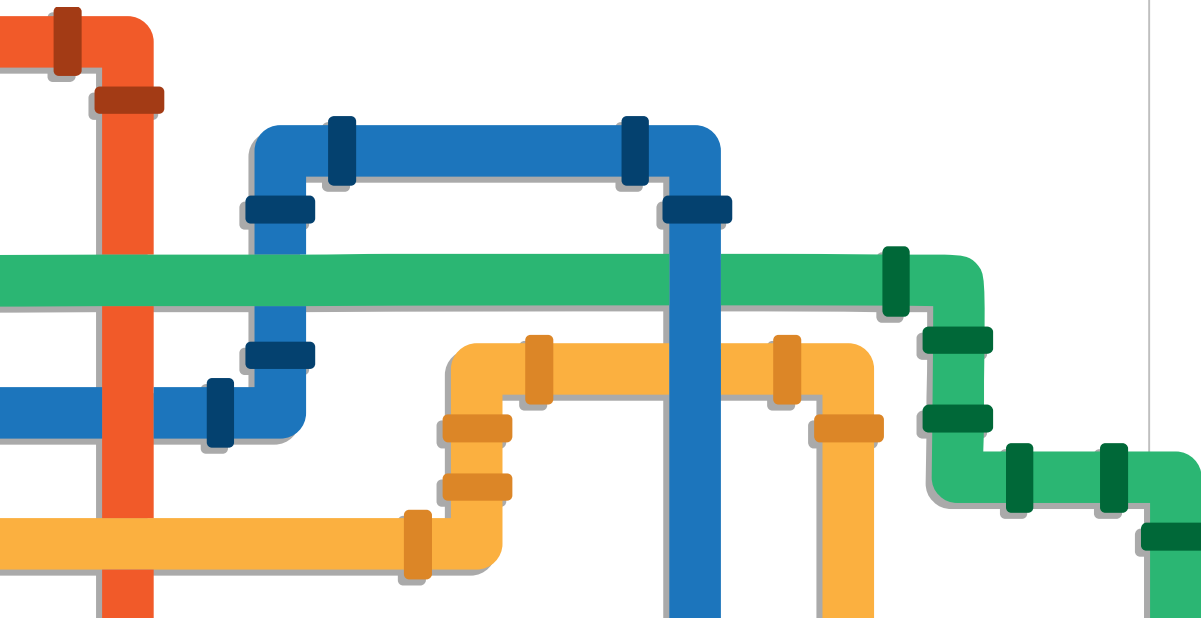
Opportunities

- Scale & cross organization
- Integration
- Digitally connected model



Case study

Read more about how we partnered with Sage Ways to build this program.



CASE STUDY



Building a Leadership Pipeline for the Future

You just learned that a key leader in one of your countries outside the US is taking another position in one month's time. Yes, there are names on her slate; however, none are truly "ready now". Three years ago this role was open with an acting manager for 4 months, and now you fear the situation will be repeated. The role is demanding, making it a challenge to fill either internally or externally. Does this sound familiar?

Challenge

Such leader transitions are pivotal moments. Having strong and ready successors on deck can ensure continuity of business execution and organizational momentum. On the other hand, a poor transition can result in churn: significant uncertainty, performance degradation, lost revenue, and an unwelcome opportunity for competitors to leapfrog. This risk is amplified the more the responsibility. At Microsoft, it was happening all too often.

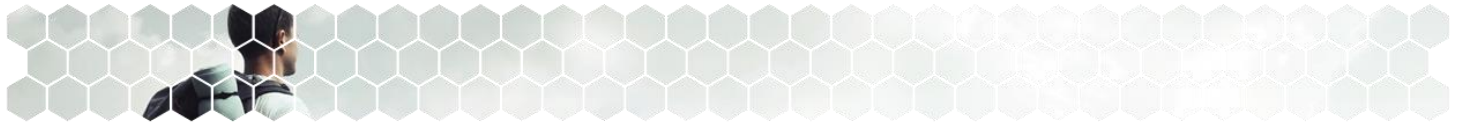
Since the stakes at transition time are increasingly high, it's imperative that companies be continuously prepared to place the right person, in the right job, at the right time. The challenge? Building an effective process for identifying, assessing and developing a pipeline of talent for these critical roles to ensure swift and smooth leadership transitions.

Capability

At Microsoft they built a leadership pipeline, targeting this new approach for the business critical Marketing & Operations leaders across the globe. They tackled the issue with a two-pronged approach: increasing executive engagement in talent management and creating a program to develop key talent for target roles.



Q&A



Building a Leadership Pipeline for the Future

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Microsoft worked with Sage Ways to design the integrated program called 'Leader Potential and Development'. The purpose of the program is to determine talent readiness, surface gaps and create a targeted development plan. The future-focused program aligns the key role to the company's business strategy, then provides real-time, relevant data from multiple stakeholders that is totally transparent. The result is a pipeline of talent all being prepared for a similar set of future needs.

The program delivered:

- A consistent approach for evaluating the potential of internal candidates.
- Targeted and accelerated professional development.
- Increased involvement and accountability from senior leadership.



This process accelerates the power and reliability of succession planning by ensuring participants are focusing on the capabilities that will have the most impact.



Sage Ways started by building a **Success Profile** of current and future capabilities required for the target role. The key to the approach is to create a very specific target profile of what “excellence” looks like for the role – consisting of three main parts. The first is **leadership key results and competencies** that are considered critical for any leader at this level of the organization. Secondly, **versatility** looks at the future skills they will be required to balance. For the last part, experiences, is a mapping of all of the business and functional **experiences** that a senior leader has gained in their career.



Change

Close to 50% of key talent from the program have been promoted into the target roles or are making moves into new positions that will give them the experience they need to fill the role in the future.

Both participants and managers alike find the process invaluable:

“This has been one of the most impactful development opportunities that I’ve had. The program helped me structure my development plan in a very meaningful way to prepare myself for the next move and identify very precisely areas of focus, with feedback from different leaders. It helped me put the immediate focus on those areas and start acting concretely.”

Microsoft’s pipeline of ready now leaders for key roles has improved and they expect more talent sharing across geographies as they prepare leaders for the future.



Create the capability to change.

Sage Ways helps people and businesses create a dynamic capability to change, so they can adapt to today’s ever-increasing demands and complexities with ease and creativity.

sagewaysconsulting.com
(206) 618-4370