



California Transit  
Association



# *Say “KNOW” to Brain Drain & YES to Succession Planning*

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**California Transit Association**  
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# Why Succession Planning?

- More than 60% of an organization's assets are tied to the individuals it employs.
- Employees of today switch jobs on average, every 5 years.
- Transit seeks to lure and attract the best talent—succession planning is a key lever.
- 65% + transit employees are 45 years or older and yet only 15% have a viable/workable succession plan in place.
- The #1 reason employees leave an organization?

# Succession Planning—What it *is*



A ***deliberate*** and ***systematic*** organizational process that ensures ***leadership*** continuity in key positions, ***retains*** and ***develops*** intellectual and knowledge capital for the future, and ***encourages*** individual ***advancement***.

# Succession Planning—What it *is* (cont.)



A means of ***identifying and grooming*** key individuals for critical management positions that increases their ***readiness*** for greater responsibility before a key position becomes available.

# Succession Planning—What *it's not*

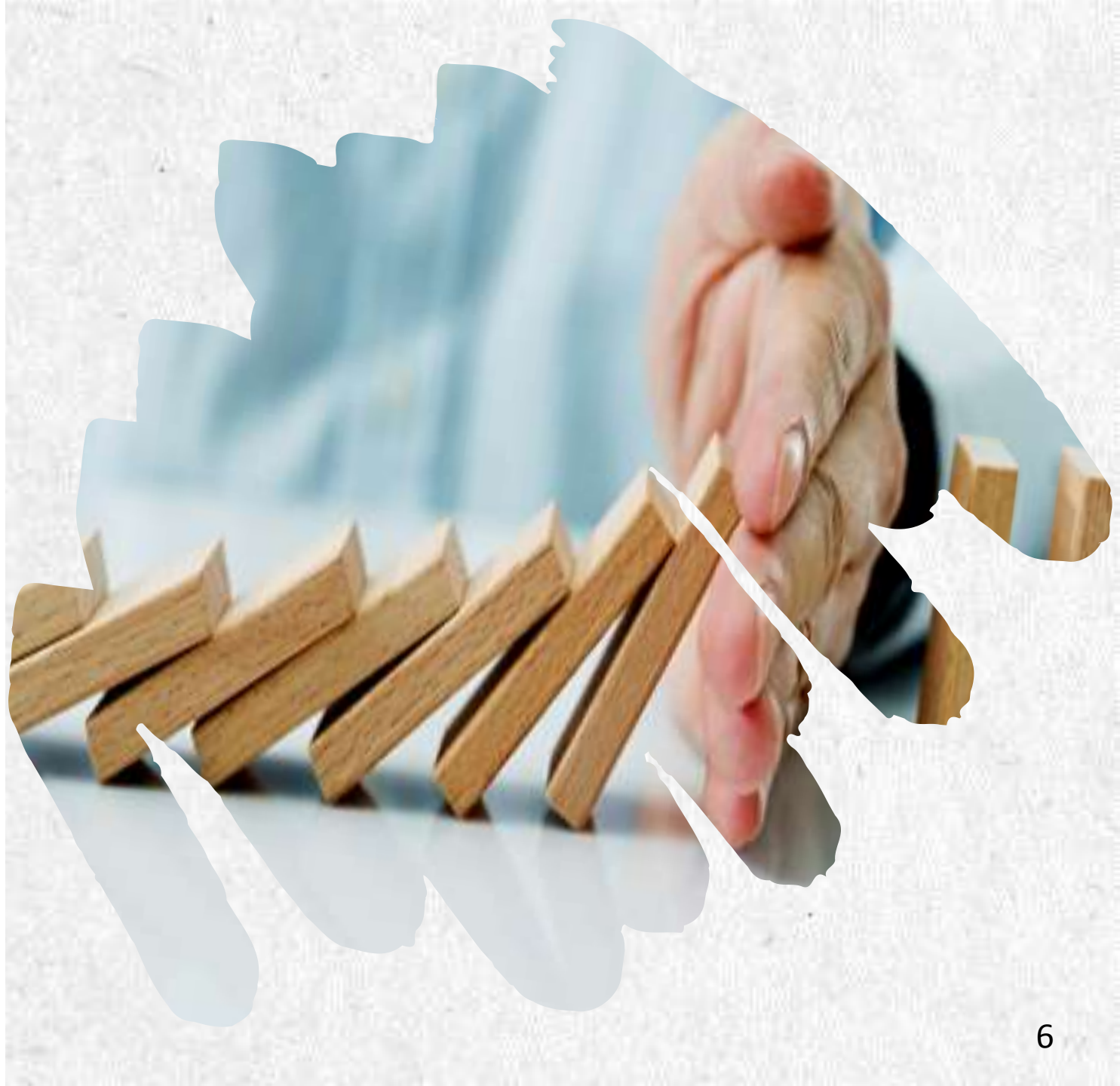


- It's not *just* about replacement
- It's not *just* a leadership development program
- It's not *just* about the CEO/GM position
- It's not a “program”

# Downsides If Not Addressed—

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- ✓ To your organization?
- ✓ To your bottom line?
- ✓ To your taxpayers?
- ✓ To the culture?
- ✓ To your reputation and brand?
- ✓ To the current and future leaders of your organization?



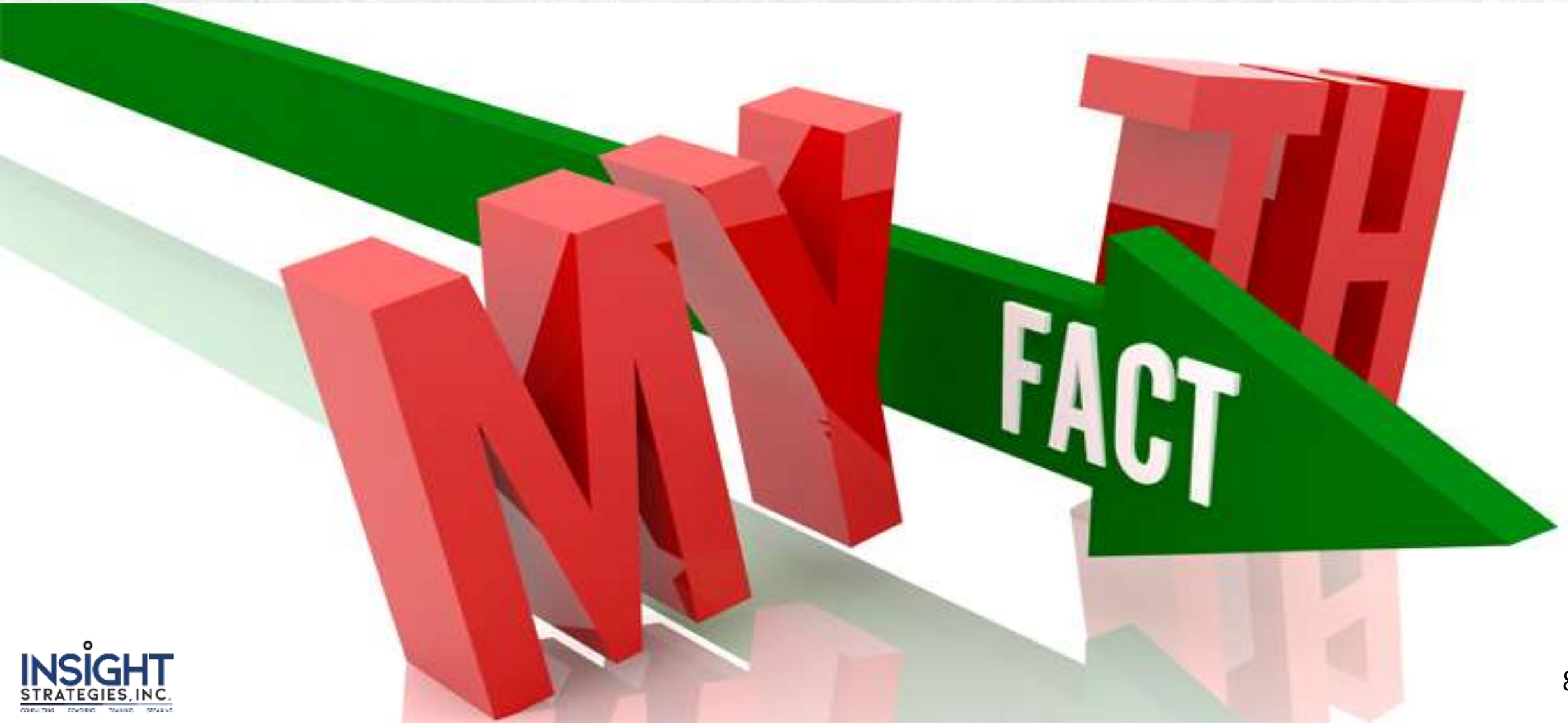


# So...Why Aren't We Doing It?

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Succession Planning in  
Transit...under investigation

# MYTH BUSTERS!





# FACT OR MYTH? #1

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It is best to start thinking about a successor about 5 years before one plans on retiring.

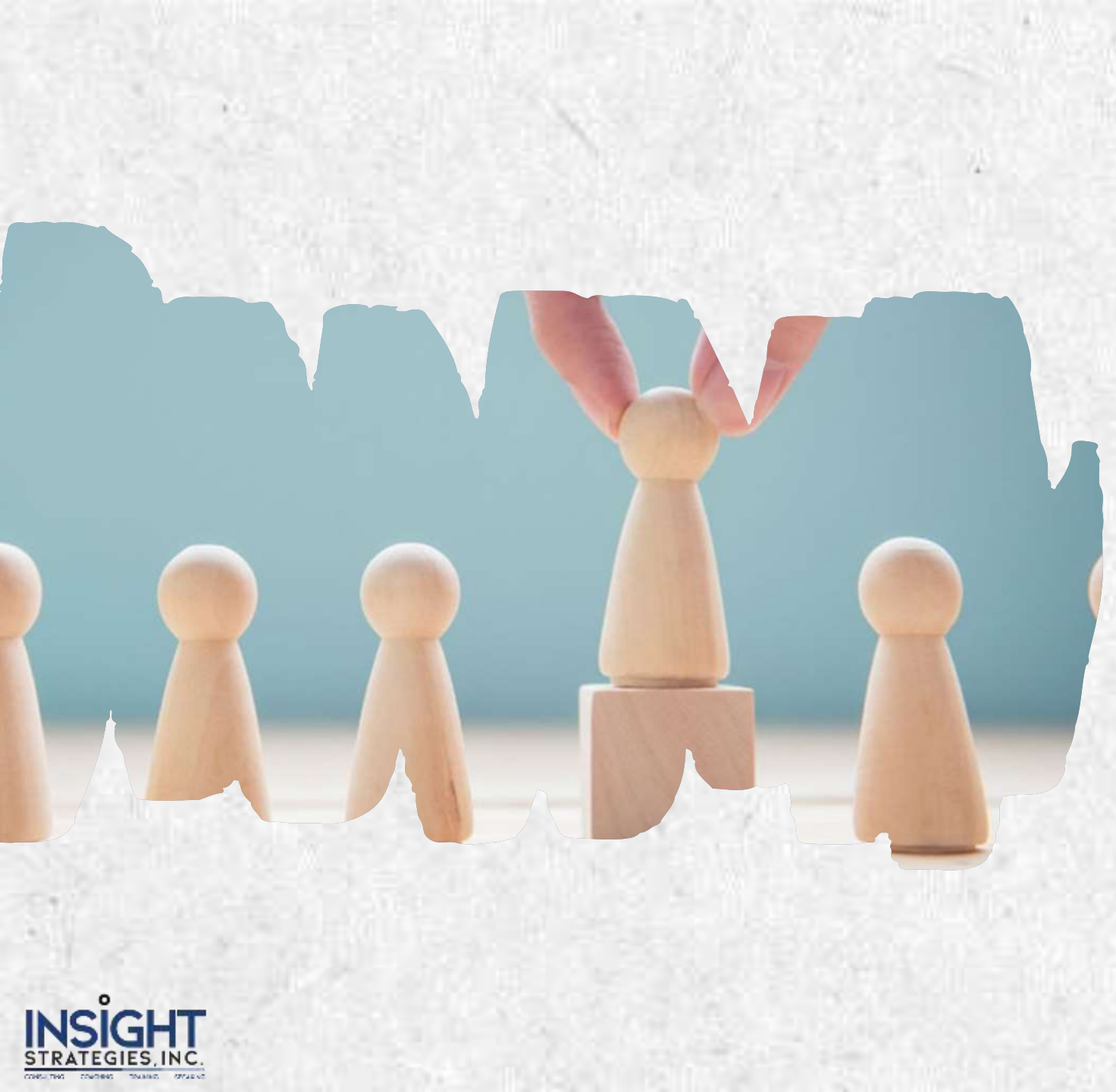


## FACT OR MYTH? #2

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All employees must be treated equally.





# FACT OR MYTH?#3

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Employees identified as high potential should be treated like any other employee.

## FACT OR MYTH? #4

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Selection equals favoritism.

## FACT OR MYTH? #5

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Employees not selected as high potentials will feel unmotivated.





## FACT OR MYTH?#6

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In some companies, at least 50% of the people in leadership positions are operating far below their assigned layer.



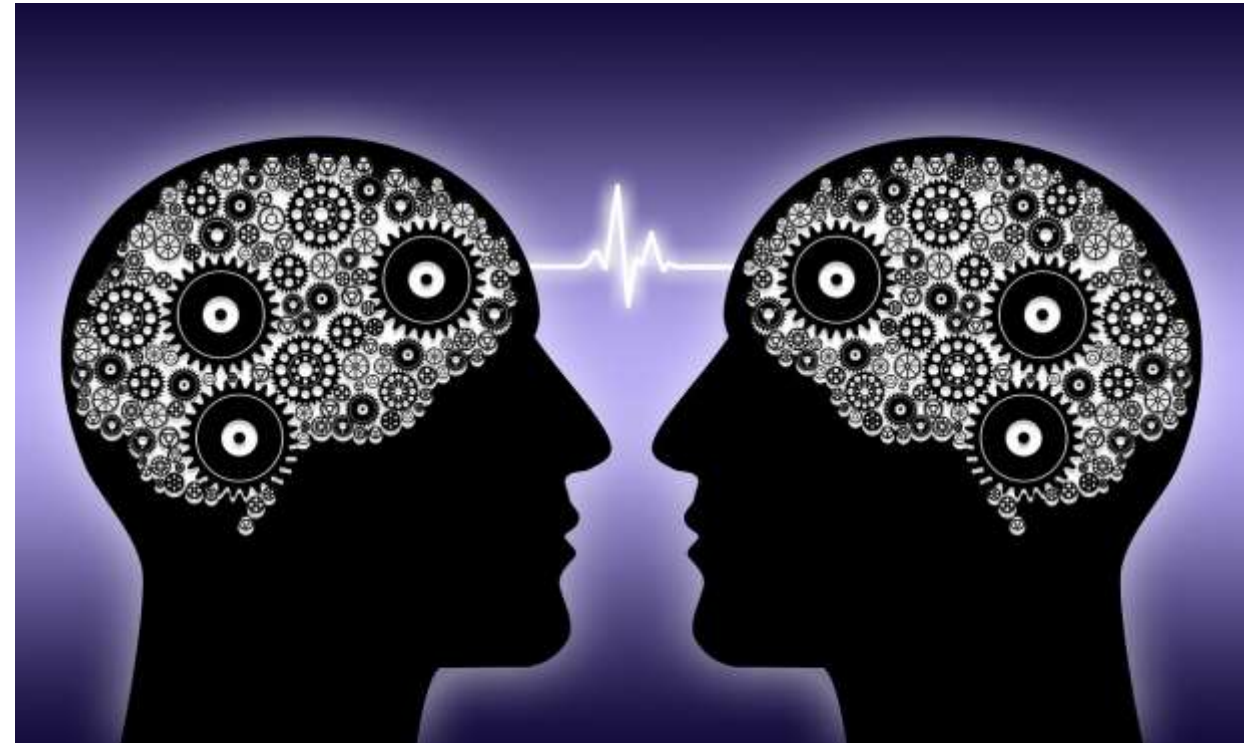
## FACT OR MYTH? #7

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Succession planning done right, should at some point guarantee a promotion to those identified as high potentials.

# HOW TO GET STARTED

1. Run the data—it's your why!
2. Create a business case—what's in it for the organization?
3. Enroll the C-Suite
4. If you're in the C-Suite, make it happen



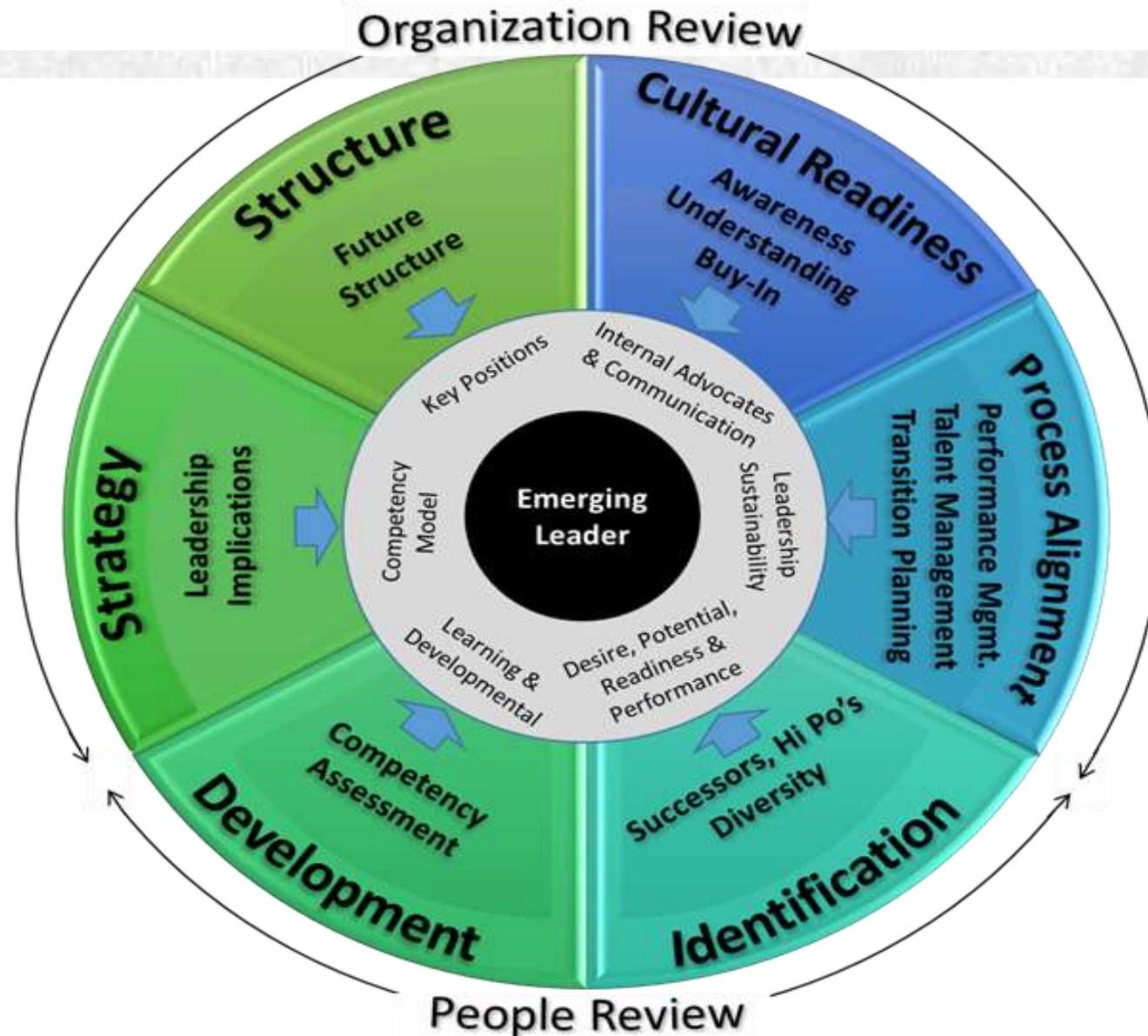


# ***Succession Planning is Success Planning— Keys to Success!***

- CEO owns it!
- Understand it's a process, it's culture changing, and it will take time to stick
- Identify your top talent—Insight's Criteria:  
Performance, Potential, Readiness, and Desire
- Treat future leaders differently
- Develop leadership competencies



# Insight Strategies—Succession Planning Framework



*If you're engaged with your employees,  
you'll notice if they start to disengage.*

**-Teri Fisher**



# THANK YOU!

You can find us at:

 [www.InsightStrategies.com](http://www.InsightStrategies.com)

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*As trusted partners...we cultivate  
greatness in organizations and people  
by improving performance, affecting  
culture, and raising the bar.*



## FACT OR MYTH? #4

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Providing leadership development is the same as succession planning.



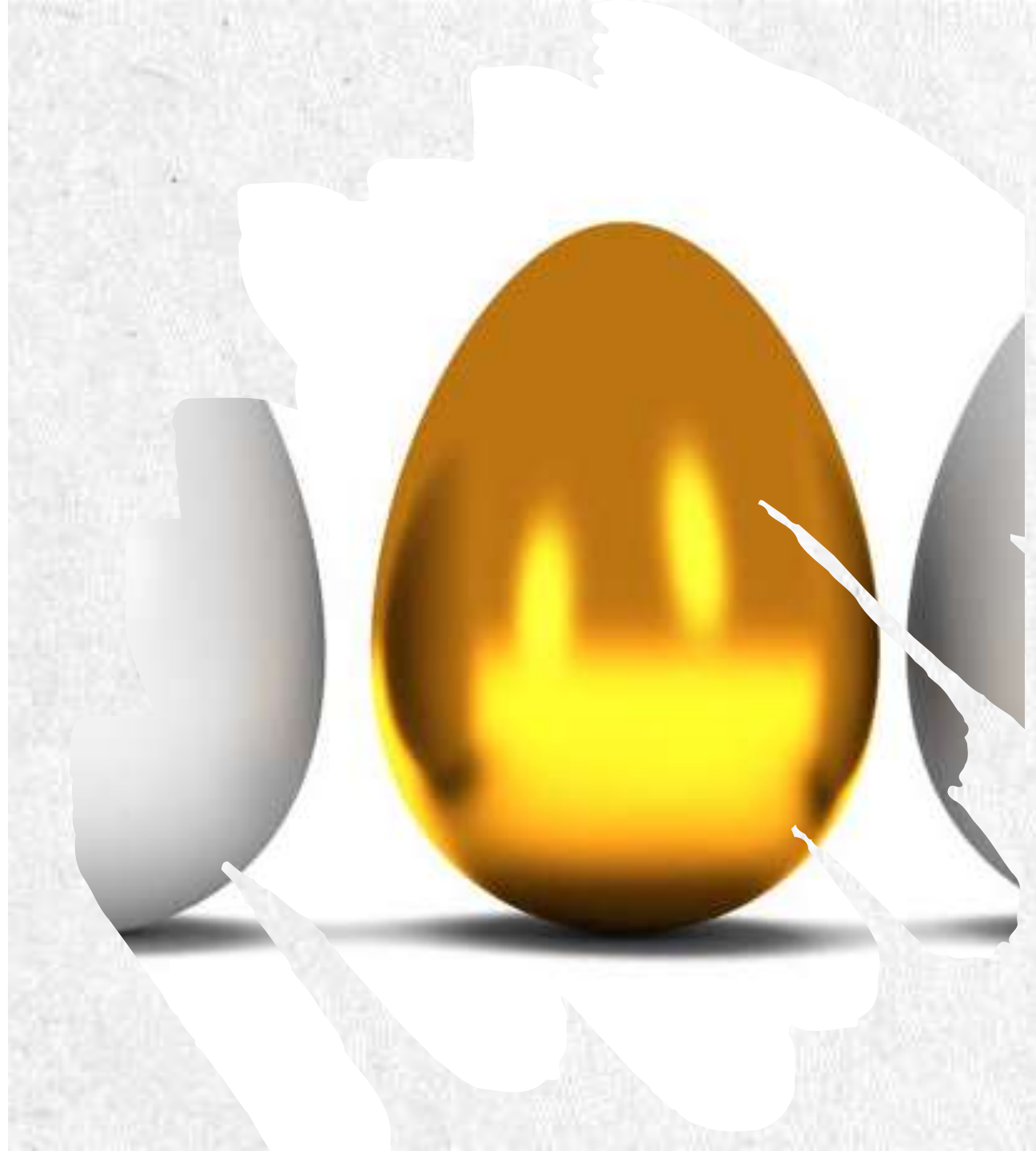
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## FACT OR MYTH? #6

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Treating certain employees as special goes against HR policy.





# TWO-PRONGED APPROACH:

- 1) Establishing an Organizational Process
- 2) Cultivating Leadership through Development

