



8020  
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Seattle  
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888.344.8020

www.8020VISION.com

# Succession Planning

*The key to preserving institutional knowledge while preparing tomorrow's leaders today*

This workshop will help public sector organizations prepare, plan, and formalize execution of a knowledge preservation and leadership succession strategy to address the coming wave of “boomer” retirements. The process is fast-paced, fun, and yields high value results that teams and leaders will support.

*This workshop is a complement to the Talent Development workshop. Both are proactive approaches to workforce management. Talent Development focuses on new and incumbent workers with a longer time horizon. Succession Planning focuses on retaining institutional knowledge as your senior workforce exits.*

## Common Applications for Succession Planning

### Leadership Teams

- What 20% of your “institutional knowledge” is critical to 80% of your results?
- What strategies are in place for preparing your next generation of leaders?
- Where will you find those leaders?

### Human Resource Departments

- What 20% of your workforce drives 80% of your organizational impact?
- How is institutional knowledge captured and preserved?
- What resources will you need to insure continuity of services after the retirement wave breaks?

### Training and Development

- What 20% of your learning services drive 80% of your performance results?
- What programs and services will you need to transfer current institutional knowledge into desired future performance?
- How will you shorten the learning curve for aspiring leaders and key personnel?

### Union Groups

- What 20% of your members hold 80% of your critical shared memory?
- How will you insure that retirements remain a cause for celebration rather than loss?
- Who will you need to partner with to insure effective continuity and membership strength?

## Workshop Process

Succession Planning uses a three-phase process – preparation, brainstorming and action planning. During Brainstorming and Action Planning, you participate in a variety of fun teambuilding activities to help keep the team engaged and get the creative juices going.

*"Forty-two percent of the 15.7 million individuals working for state and local government in 1999 were between the ages of 45 and 64 years old. Two-fifths of state and local government employees will be eligible to retire in the next 15 years."*

Joan E.Pynes,

The Implementation of Workforce and Succession Planning in the Public Sector



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## Example Workshop Schedule

### Workshop Preparation & Customization

Identify participant needs and define:

- Objectives and desired outcomes
- Deliverables
- Participation requirements
- Optimal facilitation methodology
- Craft program agenda to achieve the objectives

### Day 1: Brainstorming

Depending on the objectives, Day 1 will typically focus on:

- Defining Succession Planning as forward-looking, positive outcomes to be achieved.
- Generating large volumes of high-potential ideas through powerful, divergent thinking excursions.
- Selecting ideas most likely to yield the defined outcome, using a simple but effective Return on Investment selection process.

### Day 2: Action Planning

Establish individualized commitments and action plans.

- Assess selected ideas to determine core values as well as critical implementation challenges.
- Establish SMART Succession Plans (SSP) that invite participants to sign up for key components of the plan.
- Resolve critical challenges to establish momentum for execution of the SSP.

## Who should attend?

Agency leaders/decision makers in the following departments and functions: Executive, human resources, training and development, IT personnel, marketing and public relations, union groups, legislative staff, service/project teams.

## Location

Though we deliver our workshops anywhere in the world, we encourage you to consider doing this work away from the office – in a setting that allows the team to unplug from day-to-day pressures and make the most of the two-day workshop. We partner with a variety of hotels and resorts that have facilities, if you need suggestions for a venue that meets your organizations needs.

## Workshop Cost

Every workshop we do is tailored to meet the specific objectives of the team. Workshops cost \$485 per participant, which covers up to 16 hours of pre-planning/customization, and the two-day workshop. Call us to discuss your specific objectives and requirements and we will provide you with a detailed quote.

## Next Steps

For more information about Inter-Agency Partnering or any other 8020 Vision programs or services, please visit our website at [www.8020vision.com](http://www.8020vision.com) or contact us toll free at 1.888.344.8020.

## About us

We are experienced executives and facilitators, with a rich background in helping public agencies, companies, teams, and individuals focus on effective solutions to complex problems.