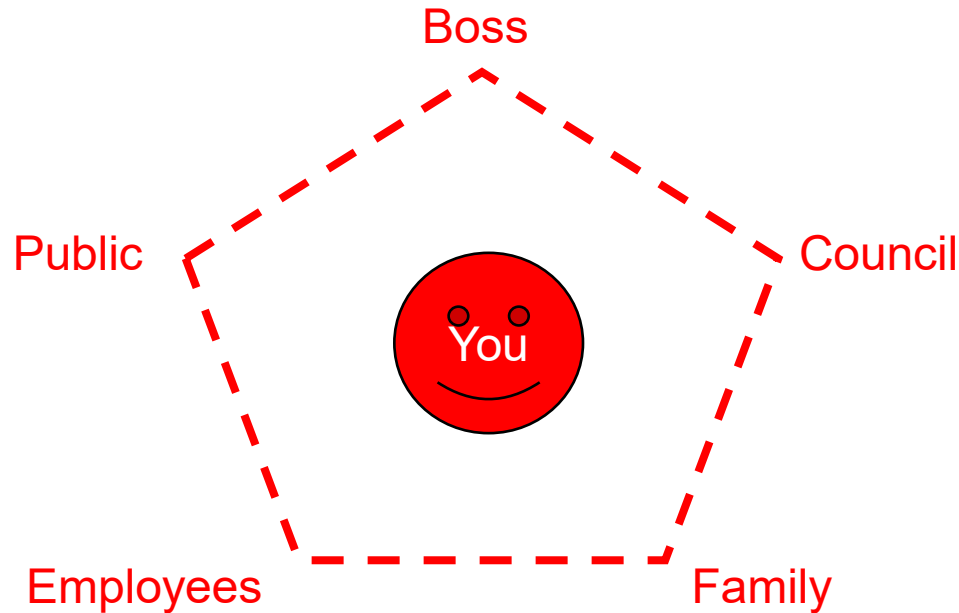


Succession Planning and Change Management

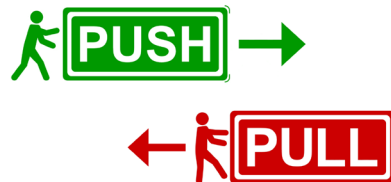
AMCTO - Zone 6

April 17, 2026

The Big Picture



Bottom Line:
You are pushed and pulled in all directions. You will have multiple opinions and conflicting views. Stay focused.



It Starts With the People

Organizational Effectiveness is dependent upon the Right Strategy, supported by the Right People, doing the Right Job, at the Right Time for the Right Price.

$$OE = RS (P+J+T+P)$$

Keep this formula handy when faced with a people problem.

My favourite management video:

[Management](#)

Common Themes

- **Start with culture** — align initiatives with municipal values, norms and everyday behaviors so succession and change efforts fit local practices and gain buy-in.
- **Must have organizational leadership/support** — visible commitment from CAO, senior managers and council provides direction, legitimacy and momentum.
- **Both don't have an on/off switch** — they are continuous, iterative processes that evolve with service needs, demographics and policy changes.
- **Must have a framework** — structured approaches (roles, stages, tools) create repeatable, transparent processes across departments.
- **Stakeholder engagement & communication** — ongoing, transparent dialogue with elected officials, unions, managers, front-line staff and the public to build trust and reduce resistance.
- **Talent development & capability building** — systematic learning, mentoring, job rotations and leadership pipelines so people can fill new roles and sustain change.
- **Data-informed decision making & metrics** — workforce analytics, skills inventories, risk assessments and performance indicators to prioritize actions and track progress.
- **Governance, accountability & resourcing** — clear roles, decision rights, policies, timelines and dedicated funding/staff/time to ensure initiatives are executed and sustained.

“Culture Eats Strategy for Breakfast” (Peter Drucker)

1. **Model leadership behaviours** — Senior leaders visibly demonstrate learning, delegation, and openness to feedback (e.g., public “lessons learned” at council meetings, job-shadowing senior staff).
2. **Embed expectations in performance management** — include succession and change behaviours (mentoring, knowledge transfer, change advocacy) in job descriptions, annual goals and performance reviews.
3. **Create safe, structured learning opportunities** — run low-risk pilots, cross-department rotations, and after-action reviews so staff can try new roles/processes without fear of blame.
4. **Reward and recognize collaborative development** — celebrate mentors, internal hires, and teams that adopt new practices through awards, spot bonuses, or formal recognition at staff events.
5. **Build routine communication rituals** — regular town halls, manager briefings, and internal newsletters that normalize succession conversations and explain change rationale and progress.
6. **Align systems and resources** — ensure budgets, training programs, HR processes (knowledge capture, job-shadow protocols) and governance support succession and change work so culture change is reinforced by practical tools.

What is Culture?



- The values/assumptions shared within an organization.
- Provides direction toward the “right way” of doing things.
- An organization’s DNA is invisible, yet powerful template for employee behaviour.
- Culture is both top down (modelled or decreed) and bottom up (behaviours and actions) – you need to understand both.

Is your organization ready?

Your Hiring and Promotion Strategies Must Align With Your Culture

“A promotion is worth a thousand speeches.”

Jack Welch

[Link to Jack Welch Interview](#)



Your Toolbox

- In order to implement succession planning or change management, you need a toolbox of resources that are “built in” to your day-to-day way of doing business.



Five Tools to Support Your Efforts

1. Delegation

The Big Mis-truth

“It is just easier to do it myself”

Why Should You Delegate?

- You are building your team and re-enforcing your culture
- You are freeing up your time to work on important items
- Your team will respect you more if they are involved
- You will build buy-in and support
- You can use it to assess talent and groom new leaders

When Should You Delegate?

- Time is on your side
- You need to build consensus and support
- You need to free up time to work on other important projects
- You need to “test” the abilities of your team
- You want to strengthen your team

THREE LEVELS OF DELEGATION

Use this in
sequence to
build confidence
in new/emerging
leaders



**ADMINISTRATIVE –
PAPERWORK AND
ROUTINE TASKS**



**OPERATIONAL – DAY TO
DAY OVERSIGHT OF AN
OPERATIONAL ISSUE**



**STRATEGIC – A MISSION
CRITICAL PROJECT**



10-50-90 Rule

The PAT Principle



The diagram illustrates the PAT Principle with three components: Purpose, Action, and Timeframe. Each component is represented by a light pink rounded rectangle with a red border, set against a larger red rounded rectangle background. The components are arranged horizontally from left to right.

Purpose

Action

Timeframe

10

During the first 10% of the project, you will be heavily involved in providing guidance and direction

Be clear about the objectives the **PAT**

If it is a team, establish Team Norms

Emphasis rolls, including your own

50

At the 50% level you will do a major check-in

Remind and reinforce **PAT**

How's it going?
Do you need more resources?

Adjust the course if necessary

90

At 90% expect
a full review of
progress

Ask if minor
course
corrections are
required?

How can I help?

Say thank you!

Project Complete

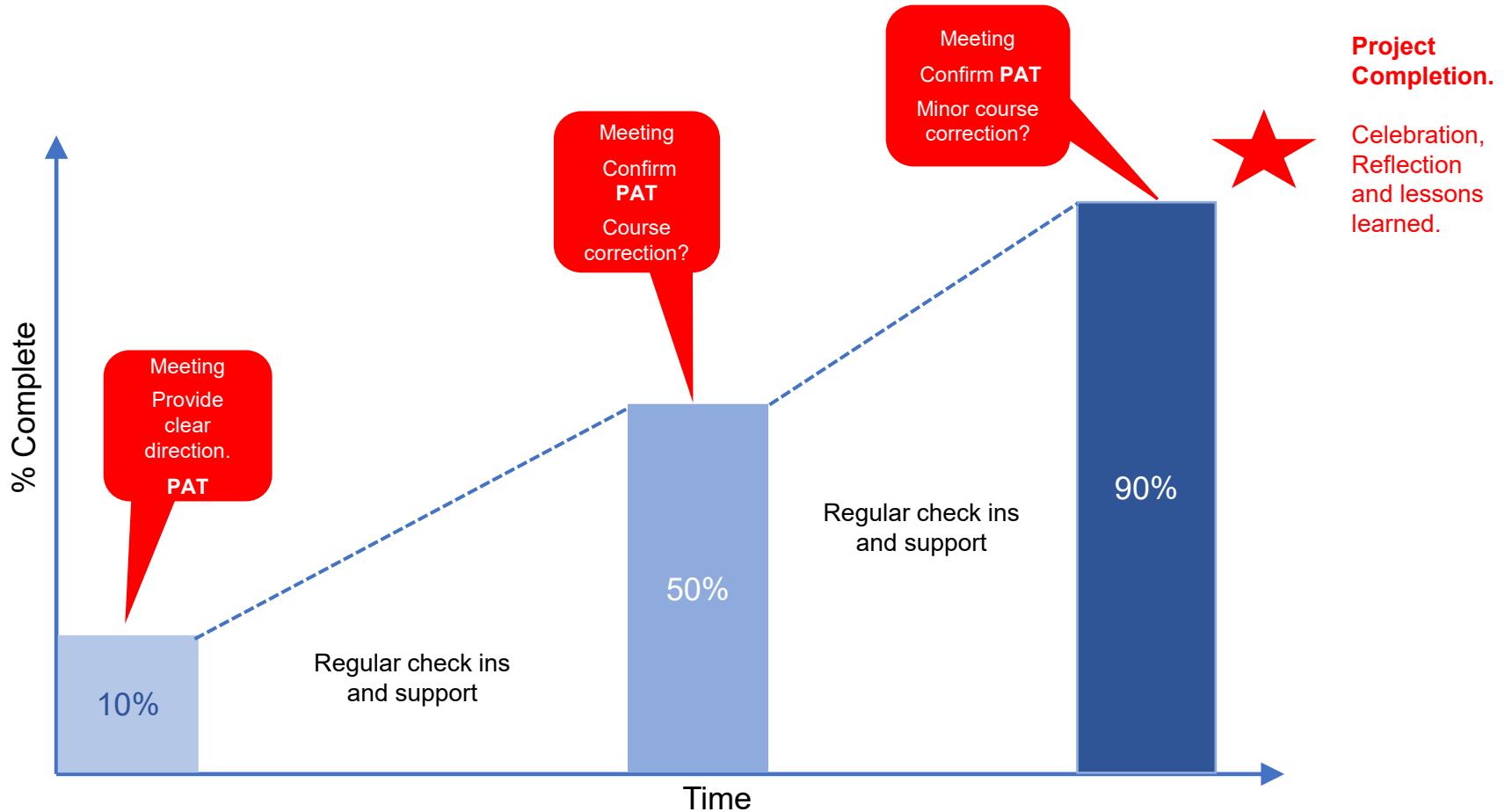
Debrief

Discuss
lessons
learned

Celebrate
success

Say thank
you!

10-50-90



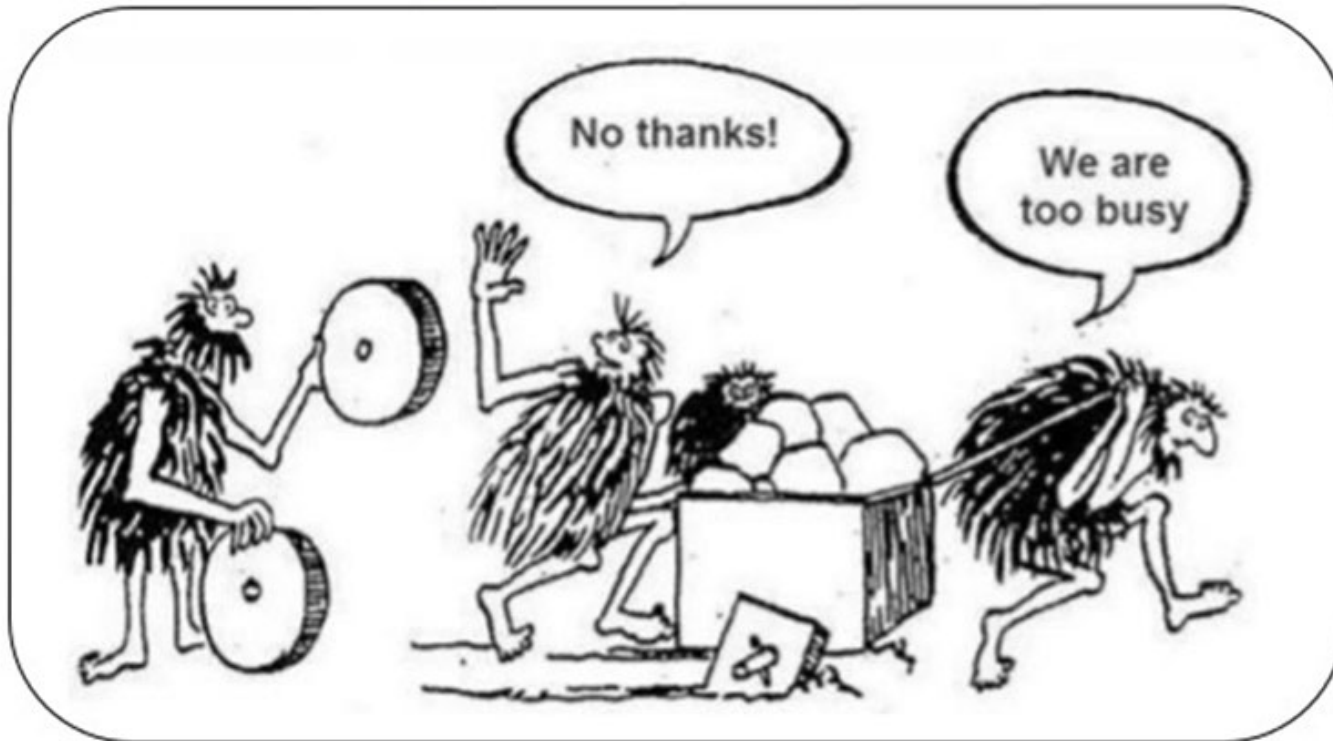
2. A Change Framework

Setting the Table

“It is not the strongest or the most intelligent that will survive but those that can best manage change”

Charles Darwin

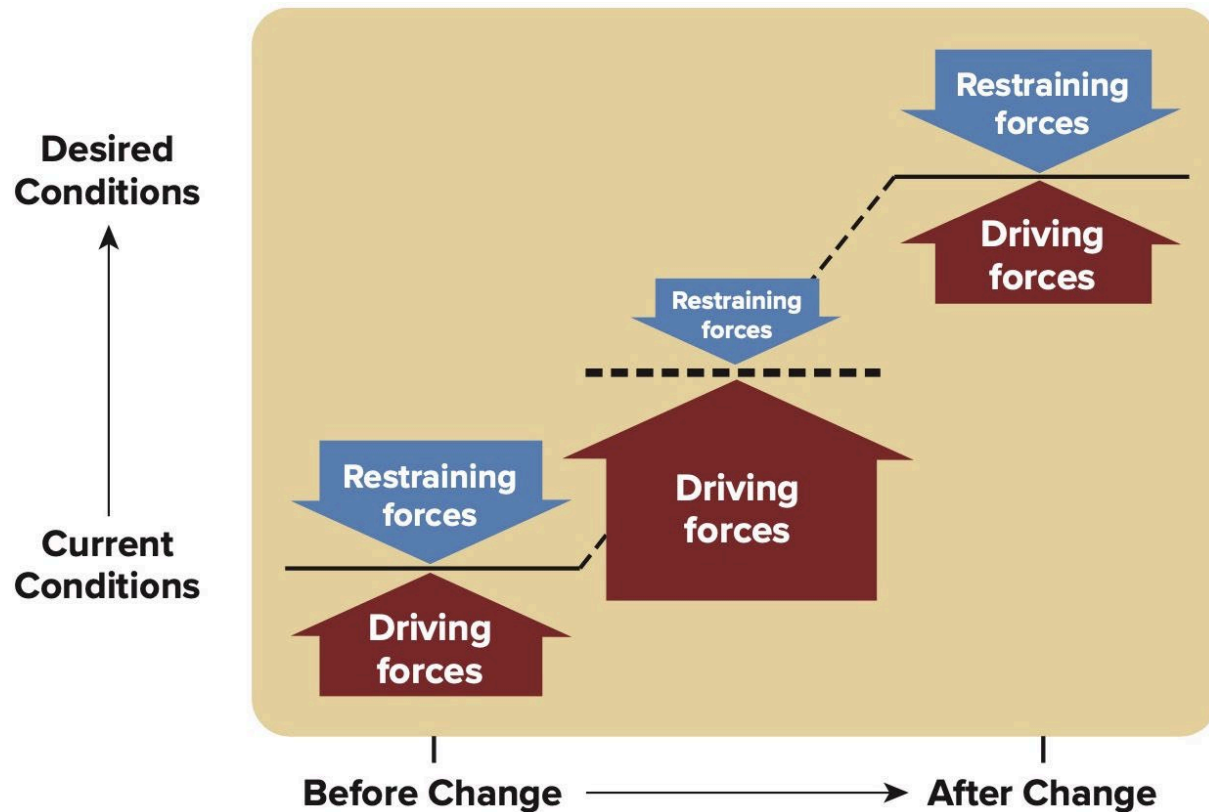
Challenge of Process Improvement



Continuous Improvement Frameworks

- **Total Quality Management (TQM)** – started by the U.S. Navy. Focuses on ensuring quality at every step in a process
- **PDCA** or the **Deming Cycle** (plan, do, check, act) – documenting the proposed plan, testing the plan, checking the plan's success, act or implement
- **TPS** (Toyota production system/just-in-time) – using the organization's long-term philosophy to guide decisions rather than short-term financial goals
- **Lean** – focus on waste reduction strategies
- **Six Sigma** – started at Motorola and adopted by GE – targeted at reducing defects and inconsistencies

Kurt Lewin's Approach

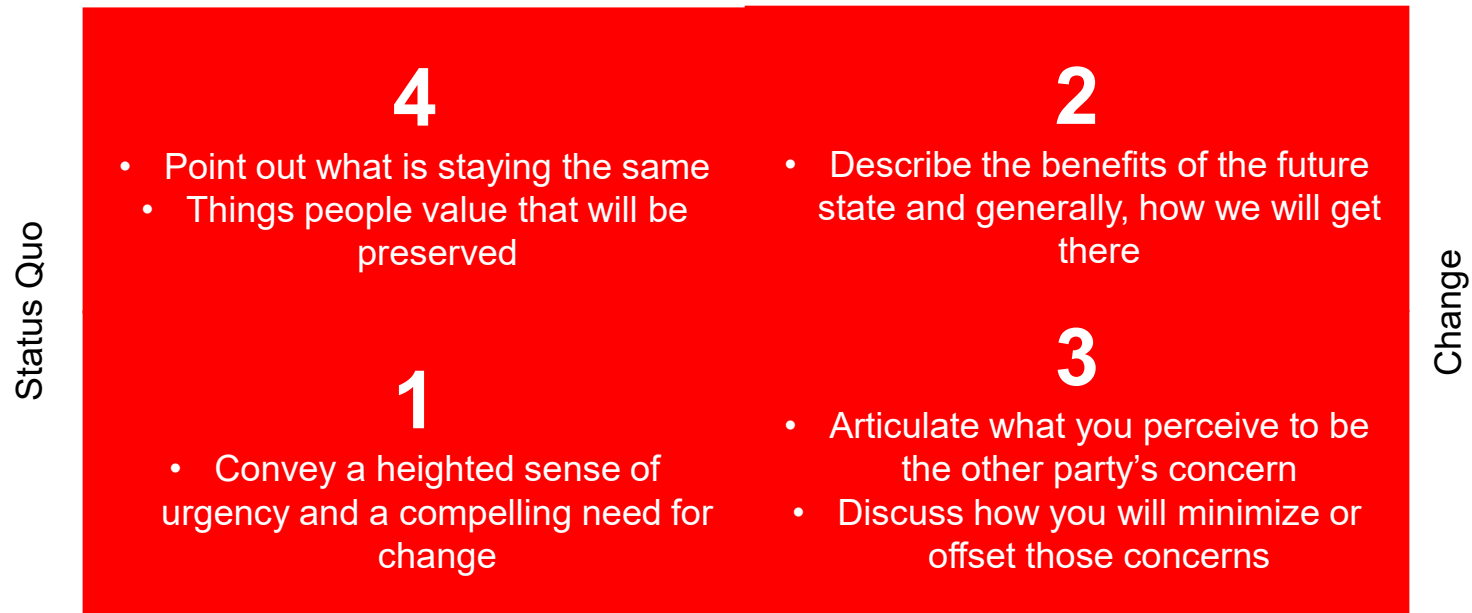


More Information:

<https://www.prosci.com/blog/lewins-change-theory>

Strategic Influencing – The 4 Box Model

+ Advantages +



Keys to the 4 Box Model – 10 Minute Formula

Step Four

1.5

Finally, the communicator must specify those things people value that won't be impacted by the change. Put simply, communicators must talk not only about what is changing, but also about what is staying the same.

This has a calming effect on those who are convinced that "everything is changing" and reassures people that this change will be reasoned and balanced, not just "change for change's sake".

Step One

3

The communicator must first explain the reasons for the change. It is virtually impossible for people to accept change if they don't understand the rationale driving that change. All too often, employees lack commitment because they simply don't understand the logic. Communicators must use facts and language that is grounded in reality. Stakeholders being asked to change must feel this rationale represents their reality and is not simply perceived as "corporate-speak".

Step two

1.5

The communicator then needs to address the benefits of the change but in a way that resonates with those being asked to change. Furthermore, when extolling the virtues of change, the communicator must initially keep this brief – otherwise, it comes across as hype or "cheerleading".

• Step Three

5

At this point, it is critical to talk about what the audience would see as the downsides to the change, as well as talk about how the organization and its leaders will lessen these issues and concerns. That does not mean that the organization can "fix" everything; it can't. But what is important is the acknowledging of these issues and a demonstration of genuine intent to help with these issues.

Equally important at step three, the communicator needs to invite stakeholders to work with the organization to find solutions to the challenges presented by the change.

3. Internal vs. External Hiring

The Case for Succession Planning

“He who fails to plan is planning to fail”

Winston Churchill

Internal Recruiting

Advantages

- Employee is familiar with the organization and your culture
- Employee is “known”, fit with the organization as well as past performance as an indicator of future success
- Improves employee morale & motivation

Weaknesses

- Internal competition can reduce cooperation
- No “new blood” so can prevent creative solutions
- Poor morale (possible turnover) of employees not promoted

External Recruiting

Advantages

- Able to acquire skills and knowledge that may not be available within
- Newer ideas and novel ways of solving problems may emerge

Weaknesses

- Newcomers may not fit in
- It is very hard to evaluate cultural “fit”
- Newcomers take longer to learn about the organization
- Usually more expensive
- Lowered morale and motivation of current employees

Bridgespan Article – Key Points

- Consider if they have 70% of the job requirements
- Constant communications is required
- There should be both internal and external candidates considered
- Avoid implicit or explicit promises
- Maintain confidentiality
- Don't continue with an internal candidate if they do not have a realistic chance
- **kjp says:** embed these principles in your succession plan policy/process/culture

4. Evaluating Talent

Setting the Table

“First who – get the right people on the bus”

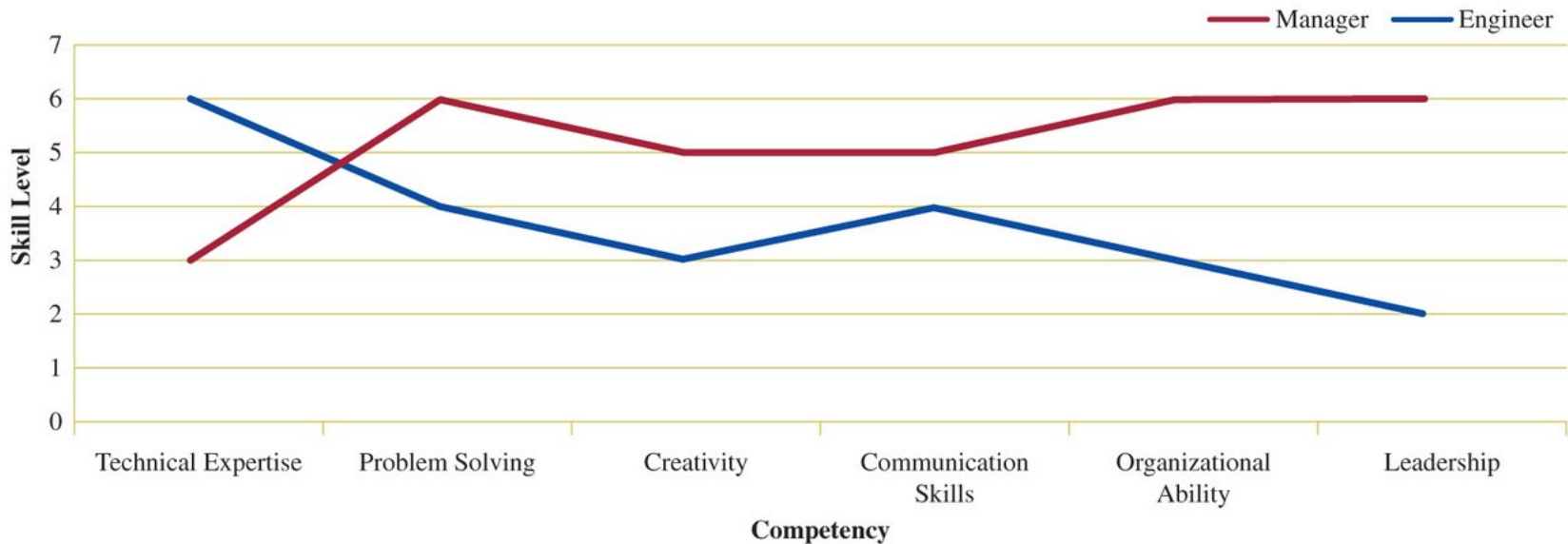
Jim Collins, Good to Great

Competency Models

- **Competency**
 - Knowledge, skills, ability, or behaviour associated with success on the job
 - Broader in scope than KSAOs (e.g. communication)
- **Competency Model** (competency framework)
 - Describes a group of competencies required in a particular job
- **Competency Matrix**
 - A list of the level of each competency required for several jobs at an organization

Competency Models – Job Specific

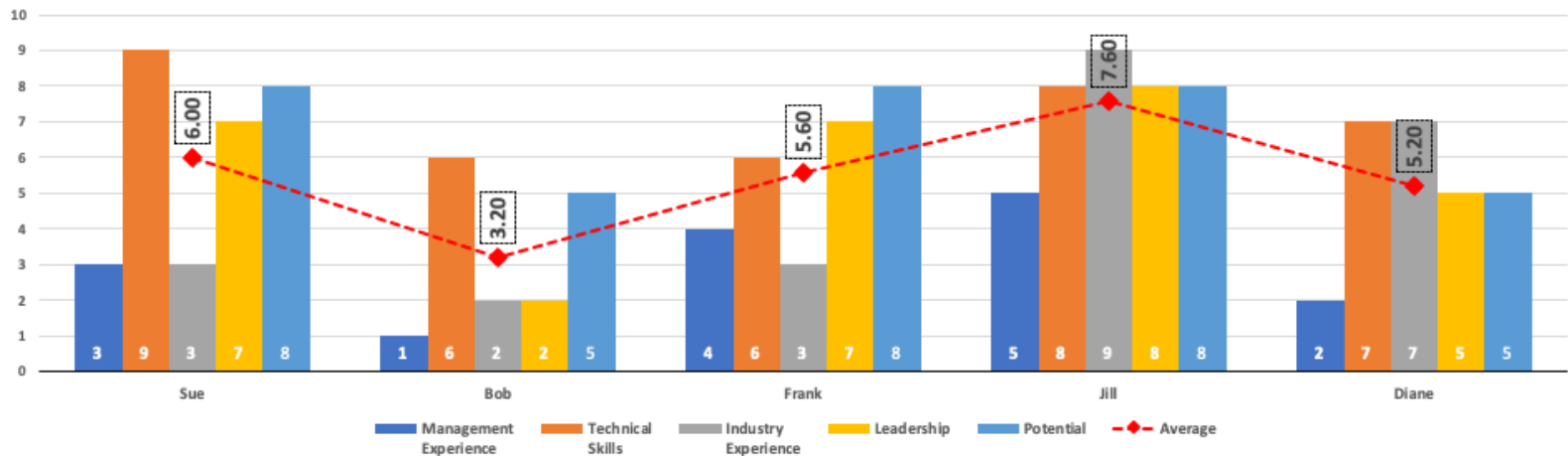
- **Competency Matrix**
 - A list of the level of each competency required for different jobs



Competency Matrix – Individual Specific

Competency Assessment

	Management Experience	Technical Skills	Industry Experience	Leadership	Potential	Average	Descriptors
Sue	3	9	3	7	8	6.00	Competent, Respected, Lacks Management Experience
Bob	1	6	2	2	5	3.20	Technical skills, lacks experience and confidence
Frank	4	6	3	7	8	5.60	Potential, confident, doesn't know what he doesn't know
Jill	5	8	9	8	8	7.60	Solid, respected, not a strong manager
Diane	2	7	7	5	5	5.20	Technically strong, weak leader



5. Emotional Intelligence

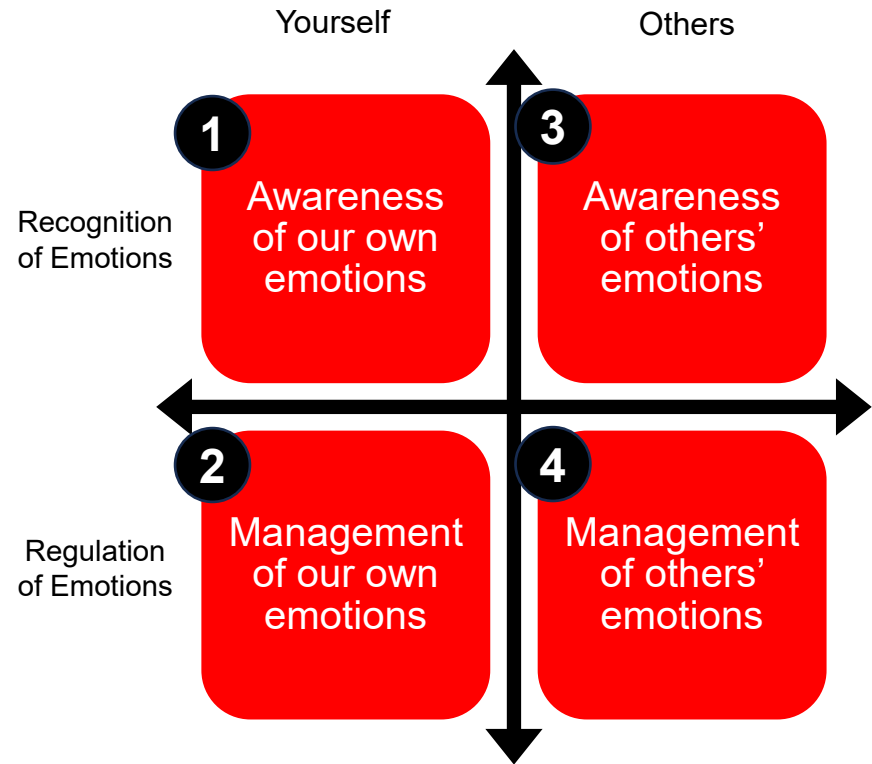
The Key to You and Me

“People will forget what you said, people will forget what you did, but people will never forget how you made them feel”

Maya Angelou

So, What is E.I.?

1. Awareness of our own emotions
2. Management of our own emotions
3. Awareness of others' emotions
4. Management of others' emotions



6 Tips to Improve Your Emotional Intelligence

(Source: Mindtools)

- 1. Observe how you react to people:** Do you stereotype? Do you rush to judge before you have all the facts? Try to put yourself in others' shoes and be more open and accepting of their perspective and needs.
- 2. Look at your work environment:** Do you seek attention for your accomplishments? Humility can be a wonderful quality, and it doesn't mean that you're shy or lack self-confidence. Give others a chance to shine and don't worry too much about getting praise for yourself.
- 3. Do a self-evaluation:** What are your weaknesses? Are you willing to accept that you're not perfect and that you could work on some areas to make yourself a better person? Have the courage to look at yourself honestly.

6 Tips to Improve Your Emotional Intelligence

(Source: Mindtools)

- 4. Examine how you react to stressful situations.** Do you become upset every time there is a delay or something doesn't happen the way you want? Do you blame others or become angry at them, even if it's not their fault? Keep your emotions under control at all times and especially when things go wrong.
- 5. Take responsibility for your actions.** If you hurt someone's feelings, apologize directly – don't ignore what you did or avoid the person. People are usually more willing to forgive and forget if you make an honest attempt to make things right.
- 6. Examine how your actions will affect others - before you take those actions.** If your decisions will impact others, put yourself in their place. How will they feel if you do this? Would you want that experience? If you must take action, how can you help others deal with the effects?

A Checklist

- Do you have the right strategy?
- Do you have organizational support?
- Do you have the right people, doing the right job at the right time for the right price? If not, what needs to change?
- Do you have a framework and tools for implementing your succession plan and/or change management?
- Do you have a communications plan?
- Is your initiative properly resourced?
- How will you freeze change?
- How will you discuss lessons learned?
- How will you celebrate and report success?
- How will you assess and adjust?

Thank You

Remember the Formula

$$OE = RS (P+J+T+P)$$

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Coaching, Mentoring & Facilitation
Human Resources
Re-organization & Restructuring
Strategy & Communications
Budget Planning