



## SUCCESSION PLANNING PART 2:

# The Team Talent Review

As stewards of the snowsports industry, resort leaders are increasingly aware of the need to take action to sustain a pipeline of engaged, talented employees who are capable of navigating the challenges and opportunities that lie ahead. Are you helping develop tomorrow's leaders for your organization?

This is the second in a series of articles on how resorts of all sizes and descriptions can benefit from succession planning, leadership development, and mentoring. The talent review is a critical process for identifying, energizing, and mobilizing the full potential of employees in your organization. This article outlines specific criteria to use when conducting a talent review session, a format for individual development plans, and how to design the plan.

These subjects will be addressed in further detail in special workshops at NSAA's Winter Conferences and Tradeshows at Killington Resort, Vermont, January 20-21, and Snowbird, Utah, February 10-12.

By Laura Moriarty, SPHR



MOST MANAGEMENT TEAMS at ski areas and other companies know that the best way to reduce the effects of losing key employees is through a formal succession plan that identifies and fosters the next generation of leaders. An essential part of this effort is a good leadership development program that includes training and “stretch” assignments to challenge people beyond their existing roles, so they’ll be prepared to get in the driver’s seat when the time comes.

But knowing this and doing this are two different things. If the thought of trying to put a succession plan in place seems overwhelming—especially now, at the height of the ski and snowboard season—it’s understandable. The truth is, putting such a program in place and actually adhering to it doesn’t have to be difficult or time-consuming. And, as for making it a management priority, to quote a familiar expression: you really can’t afford not to.

Why does this important initiative sometimes stall? One reason is that there will always be more good ideas than we have the capacity to execute. Every resort has a finite amount of resources, time, and attention to devote to achieving what’s most important. The urgency of the daily operational and administrative imperatives of running a resort will trump new initiatives most every time.

Yet, even when your senior management team agrees that assessing the internal talent pool is a good idea, they still need to *commit* to prioritizing and allocating whatever time and attention are needed to champion this initiative.

## THE BUSINESS CASE FOR IDENTIFYING TALENT

Peter Drucker, the late, great educator and author known as the “founder of modern management,” said, “60% of management’s time is spent fixing people problems and just 40% working to achieve goals.” We’ve all had days that mirror that proportion.

When you commit to conducting an effective team talent review, you *do* take time away from the daily hustle to focus attention on the goal of building bench strength. But you also begin to deliberately

shine more light on mediocre performers who drain management’s precious time (which eventually will help you find a better balance in Drucker’s equation).

Another influential management thinker, Jim Collins, offers his own rationale for prioritizing time to assess the talent pool. Author of the best seller *Good to Great: Why Some Companies Make the Leap...and Others Don’t*, Collins makes this wise observation: “The old adage ‘People are your most important asset’ is wrong. People are not your most important asset. The right people are.” Studies show, depending on the job, the difference in productivity between high performers and average performers is a whopping 35 percent.

Keep these insights in mind when you actually sit down at the table with your team to discuss leadership development and develop your talent review process. Also realize that it takes great collective maturity to constructively express candid opinions, backed up by objective, fact-based observations regarding another manager’s department and the team members they hire and supervise. Identifying those people who are the wrong fit for the job (or the company) and taking steps to address the situation may seem like an unpleasant task, and may even be fraught with politics, but it is one of the hallmarks of a good succession plan. Getting real with your colleagues about who the performers are—and those who aren’t—is essential. Covering for poor performers always backfires, and everyone in the organization knows who they are.

On the other hand, it’s exciting and energizing to formally identify and acknowledge your rising stars, the high-potential employees who are ready for more meaningful assignments or responsibilities. It’s encouraging to assess the growth of up-and-coming team members who are good candidates for advancement, and to celebrate those who are best suited to continue contributing in their current roles.

## CLASSIFYING TALENT

As discussed in the previous article on this topic—“Succession Planning, Part 1: Essentials for a Sustainable Workforce Pipeline” (Early Winter

2014), you may choose to classify team members into four groups of people who share similar levels of performance and potential for advancement (see figure 1). It is helpful to use certain descriptors to help you gauge each person's capability for success within your organization.

**"Limited potentials"** (category D employees) can be used to describe those individuals who do not show promise. In these cases, don't delay; it's time to invite these people to work somewhere else.

**"Solid contributors"** (category C) are those who are perfectly satisfied with consistently doing an excellent job in their current position and have no intention of advancing. Keep them happy and show appreciation for their reliability and loyalty.

**"Greater potentials"** (category B) are those who possess more talent than their current position requires. Give them opportunities for professional development and advancement.

**"Highest potentials"** (category A) are the rock stars. You need to challenge, train, and reward these people before they take the initiative to look elsewhere for more job satisfaction—or are cherry-picked by a competitor.

This article focuses on your top-talent or acceleration pool of "A" and "B" employees that will most likely shake out as a relatively small number of

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individuals. High-potential designation implies that the individual has the capacity, motivation, and talents to develop into a senior or strategic leader.

There are two excellent tools to help simplify the team talent review: 1) the individual development plan, which addresses gap management and preparedness and 2) the talent review assessment, which contains a short leadership inventory of competencies describing past performance and behaviors predictive of future potential.

### WHICH COMPETENCIES ARE IMPORTANT AT YOUR RESORT?

Each resort is unique, and the criteria for your talent review session should be customized to underscore your resort's values, desired competencies, and cultural norms. There is no one-size-fits-all approach. To customize your own talent review assessment, start by recognizing key competencies: the related behaviors, abilities, commitments, knowledge, and skills of existing high performers. Then you can use these as a benchmark for measuring the attributes of your other team members, which helps eliminate subjectivity and ensures high performers are identified and managed consistently.

In a recent article about a study conducted on management skill sets, the *Journal of Workplace Learning* illustrated a number of desired competencies on a continuum, with soft skills (i.e., emotional intelligence) as the foundation at the bottom of the pyramid and those that are more connected to education and specific work experience at the top (see figure 2, pg. 42). In this context, the upper level competencies are easiest to develop and those on the bottom are more difficult.

In today's workplace, soft skills include the

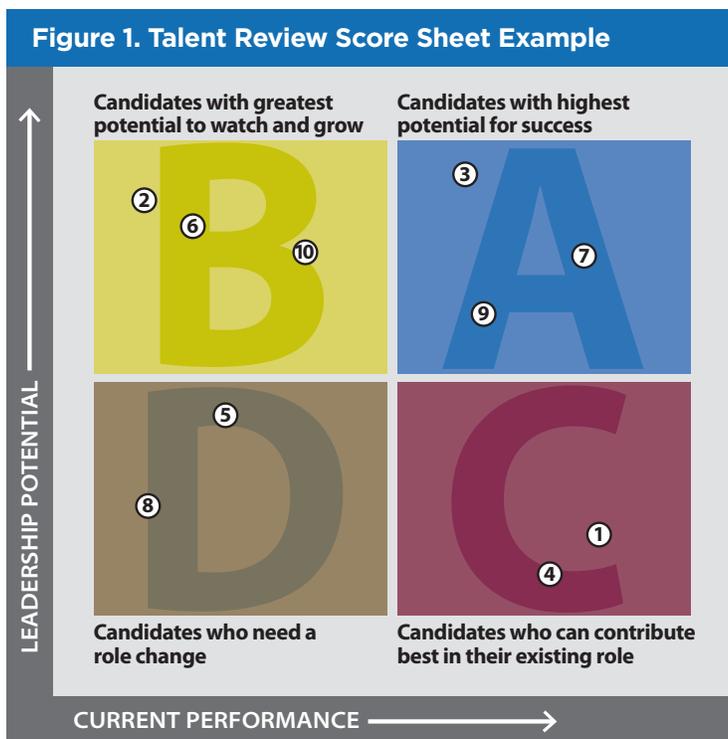


Figure 2. Competency Pyramid



ability to manage relationships, navigate social networks, and influence and inspire others to drive productivity, efficiency, and team collaboration. Interestingly, the study reported in the *Journal of Workplace Learning* revealed that a significant number of managers surveyed didn't rate themselves particularly strongly in soft skills, nor did they have any specific development intentions for themselves. However, in organizations where leadership development was both well organized and connected to strategic management, managers were more consciously aware of the soft skills and behaviors their employers value. What is valued in your in your guest-centric, sales-centric, profit-centric, or operations-centric culture?

One resort that is crystal clear at conveying its values is Sierra at Tahoe. If culture is defined as "what's important here" and "how we get things done," then John Rice, general manager, has created a learning organization with guest, sales, profit, and operations balanced like the four legs of a stool. Sierra at Tahoe is a mid-size California resort famous for developing business acumen that equips team members to open, and manage, their own businesses.

Recently at the highly anticipated Cold Water Brewery and Grille restaurant's opening in South Lake Tahoe, the visionary and driven owner, Debbie Brown, invited four well-established competing restaurant managers and owners and placed them on the VIP list. You may surmise they attended in order to check out the new competition, but there were hugs and congratulations all around. All five were recent alumni of Sierra at Tahoe's food and beverage department.

The importance leaders place on relationship building and emotional intelligence at Sierra at Tahoe is equally as important as the business know-how that propelled these former F&B supervisors to the status of successful restaurateurs. It's not unusual for high-caliber managers from other resorts and industries who are technically proficient and excellent at execution to seek out opportunities in a variety of management disciplines at Sierra. These seekers want to enhance self and social awareness to develop relationship management strategies, the foundation of the competency pyramid.

#### INVENTORYING YOUR LEADERSHIP

At first glance, you might think it's an intuitive, decisive, and quick exercise to place employees in A, B, C, or D categories. But if you want your succession plan and leadership development initiatives to be fact-based and sound, it's important to use specific,

Rice ensures they understand Sierra at Tahoe's philosophy and advises, "Your job as a leader is not to impress me, it's to impress the people you are entrusted to lead."

consistent benchmarks to help determine whether an employee has high, great, solid, or limited potential.

In the event you'd like to uptick your competency model, consider incorporating the leadership competencies discussed in the next section, which have been vetted by the global healthcare company SmithKline Beecham and presented as a best practice by the Society for Human Resource Management (see figure 3). Note the number of "soft skills" included in this model.

A word of caution: If you are developing new expectations, ensure they are not a secret. To be fair, your resort's expectations should be linked to competencies communicated on job descriptions and performance evaluation criteria. You'll want to add guidance for any aspirational competencies to your resort's training agenda. ♦

**Figure 3. Leadership Competency Model**

<b>Innovation</b>	<ul style="list-style-type: none"> <li>Think strategically</li> <li>Innovate</li> <li>Champion change</li> </ul>
<b>Customer</b>	<ul style="list-style-type: none"> <li>Improve systems and processes</li> <li>Commit to quality</li> <li>Focus on customer needs</li> </ul>
<b>Integrity</b>	<ul style="list-style-type: none"> <li>Lead courageously</li> <li>Foster open communication</li> <li>Act with integrity</li> </ul>
<b>Performance</b>	<ul style="list-style-type: none"> <li>Establish plans</li> <li>Manage execution</li> <li>Influence others</li> <li>Drive for results</li> </ul>
<b>People</b>	<ul style="list-style-type: none"> <li>Foster enthusiasm and teamwork</li> <li>Reward and celebrate teamwork</li> <li>Attract and develop talent</li> <li>Build relationships</li> </ul>
<b>Personal Effectiveness</b>	<ul style="list-style-type: none"> <li>Use sound judgment</li> <li>Convey information</li> <li>Adapt and develop oneself</li> <li>Know the organization and the business</li> </ul>

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## CUSTOMIZE YOUR TEAM TALENT REVIEW TOOL

When assessing organizational talent as well as potential successors, senior staff will often rely heavily on gut instinct and their own judgment, which have limitations. These leaders are the go-to people in their disciplines, and they clearly know what it takes to be successful in their *current* roles. To help ensure objectivity, make sure to use the following three categories of behaviors or characteristics as a touchstone: performance, potential, and readiness (see figure 4).

**Performance.** This is the first consideration in your team talent review. Demonstrated performance is backed up by a solid documented track record found in the candidate's performance evaluations. Beware of applying the oversimplified axiom "the best predictor of future performance is past performance." This assumes that people don't change, and that the anticipated performance in a new position will be essentially the same regardless of the scope and complexity of new accountabilities.

**Potential.** This second category is the likelihood that an individual can develop into a successful leader with significantly expanded, higher-level

responsibilities. Assessing potential is subjective and is often confused with readiness (discussed below). Replace intuitive definitions of high potential with standard, research-based factors that are predictive of an individual's ability to rapidly develop into increasingly complex leadership roles. Here are examples of those factors, provided by Development Dimensions International, Inc., a top management consultant company:

### Leadership Potential Inventory (LPI)

#### Leadership Promise

- Motivation to lead
- Brings out the best in people
- Authenticity

#### Personal Development Orientation

- Receptivity to feedback
- Learning agility

#### Balance of Values and Results

- Culture fit
- Passion for results

#### Master of Complexity

- Adaptability
- Conceptual thinking
- Navigates ambiguity ▶

Figure 4. Team Talent Review Tool

Talent Review Tool	Name:	Dept:	SCORE:	Talent Review Tool	Name:	Dept:	SCORE:
<b>Step 1: Assess Past Performance Leadership Competencies</b> <i>Derived from job description and performance evaluation criteria</i>				<b>Step 4: Assess Future Advancement Desire and Engagement</b>			
Business Acumen			5	Motivation to Lead			4
Strategic Thinking			4	Advancement Desire			5
Results Orientation			5	Passion for Results			3
People Development			3	Consistently Takes Initiative			4
Interpersonal Skills			3	<b>Average Future Advancement Score:</b>			<b>4</b>
<b>Average Leadership Competency Score:</b>				<b>4</b>			
<b>Step 2: Assess Past Performance Demonstration Values</b> <i>Derived from formal or informal values and cultural standards</i>				<b>Step 5: Assess Readiness/Promotability</b>			
Team Builder			5	Readiness Timeline:			5
Guest Focus			5	Ready now	5		
Holds Others Accountable			4	Ready within a year	3		
Environmental Steward			4	Ready in 1–3 years	1		
Safety First			4	Cultural Fit			4
<b>Average Values Score:</b>				<b>4</b>			
<b>Step 3: Assess Future Potential Advancement Ability</b>				Perceived Ease of Transition/Minimal Disruption to Resort			
Learning Agility			4	Evidence of Continual Self Improvement			5
Emotional Intelligence			3	Collaborative Philosophy			5
Technical/Functional Skills			5	Overall readiness timeline score			5
Brings Out the Best in People			4	<b>Average Readiness:</b>			<b>4</b>
Adaptability			4	<b>OVERALL SCORE: 4.1</b>			
<b>Average Future Potential Score:</b>				<b>4</b>			
<b>Overall Scoring</b> <b>One:</b> Past Performance Competencies <b>Two:</b> Past Performance Values <b>Three:</b> Future Potential <b>Four:</b> Advancement Desire <b>Five:</b> Readiness				<b>Rating Scale:</b> <b>1.</b> No Skill/Strongly Disagree <b>2.</b> Basic Understanding/Disagree <b>3.</b> Working Knowledge/Mildly Agree <b>4.</b> Proficient/Agree <b>5.</b> Expert/Strongly Agree			
<b>Point Scale Conversion:</b> A candidate 4.3 – 5.0 B candidate 3.5 – 4.2 C candidate 2.1 – 3.4 D candidate < 2.0							

Understanding most of these competencies is intuitive, with the exception of “learning agility,” a concept that has been used to describe individuals who rapidly study, analyze, and understand new situations and new business problems and are not afraid to jump into a problem, as opposed to just “shooting from the hip.” Our industry needs leaders who are curious about the world, willing to learn and experience new things, and have high ambiguity tolerance, excellent people skills, and vision, and are eager to innovate.

### READINESS

This third category describes how closely the individual’s experience, knowledge, competencies, and personal attributes match the requirements for a position. “It’s this person’s turn,” is not a solid strategy because tenure is very different than performance or preparedness. Some people have “five years of the same year” under their belt, during which they did not evolve and progress. Look for “T-shaped people”—those who have experienced both horizontal growth and lateral depth.

Case in point (and a true story): Consider the children’s ski school supervisor at a mid-size resort who relocates to a larger resort to become manager of the adult ski school. His talent is recognized and rewarded for the next five years. Through the grapevine he hears that his former resort has posted an opening for the assistant director position. He carefully contemplates relocating and what it would be like to take on a more senior leadership role with previous colleagues in a culture that provided the foundation for his growth.

The interview starts off well, but it shortly becomes obvious that although he has grown significantly, his former ski school director still sees him as a junior contributor. Blinded by that image, the director cannot get his head around the applicant’s obvious readiness, and rejects his former co-worker’s candidacy. Had the director used objective assessment tools rather than rely on his own bias, he most likely would have hired the person who was obviously a great fit for the job.

The guidelines you establish for your resort can be made simple and your intent for the process unbiased, but the truth is, identifying a person’s past performance, potential, and readiness will always be somewhat subjective.

Look for “T-shaped people” — those who have experienced both horizontal growth and lateral depth.

Sierra at Tahoe has found a way to make even subjective contributions fair, using an unusual and highly effective approach to succession management. While many resorts conduct an end-of-season review in April, where managers discuss their goals, “hits, and misses,” Sierra differentiates itself by soliciting insights about talent, asking each manager a series of questions about their people culminating with “Who would you identify as a ‘high potential’ team member?”

Rice expects recommendations from inside and *outside* of each departmental silo. People who are identified as greater/highest potentials populate the talent pool discussion, dubbed the “Right People Review” in a nod to Jim Collins’ “Right People in the Right Seats Doing the Right Things” mantra. Rice says “We look inside first and start the discussion with that list.” The process ensures that senior management receives recommendations and feedback from line and management levels, identifies which up-and-comers should be on their radar, and that incumbents are thoroughly assessed before management posts an opportunity externally.

### HIRING FROM WITHIN VS. BRINGING IN SOMEONE NEW

As you and your team conduct an objective inventory of talent and internal readiness within your organization, ask yourself these questions:

If we promote someone from within, would the resulting vacancy set off a chain reaction that would lead to a series of vacancies in other key positions?

If the talent is not available among our current employee force, are we willing to expand the search to the local community, regionally, or nationally?

How would we recruit for this position (e.g., search firms, networking, online posting), and how long will it take?

Developing leaders internally takes time and effort, but studies show that homegrown candidates ▶

are more likely to be successful than external candidates. According to a 2012 study by Matthew Bidwell, an assistant professor at the University of Pennsylvania's Wharton School, external hires are 61 percent more likely to be laid off or fired, and 21 percent more likely to leave a job of their own accord. Outside hires often require a higher salary, take time to come up the learning curve, and may create resentment among internal candidates.

However, there are times when internal candidates are not the best choice. If you are moving in a dramatically different direction, or your current leaders leave before the next generation is ready, you'll want to be open to bringing in someone from the outside. Ensure that you are not using the past to plan for the future, and that you are not subconsciously hiring a copy of yourself. For the health of your organization, commit to hiring successors whose objectively assessed leadership talent strengthens, not weakens, the organization's leadership capacity.

### INDIVIDUAL DEVELOPMENT PLAN

Now that you've gauged the potential of your employees in the talent review process, you have measurable data to help you take the next step: making sure they are sufficiently challenged and motivated, and that the top tier employees are managed with succession in mind. This is the time for leaders to set up meetings with each of their direct reports to establish an individual development plan (IDP).

A well-designed IDP should assess the gap between a high- or greater-potential's current status and what he or she needs to learn and experience to be prepared to assume another position. This is a collaborative communication between the team member and direct manager, who should have a candid discussion about the employee's aspirations and what types of training and support the resort could provide to help prepare him or her for that role. The IDP should address the following considerations:

- What are this employee's specific career plans?
- For what position should the employee be prepared, and over what time span? What specific training can be provided (in-house or outside)?
- How can the high-potential employee gain exposure to senior executives?

Our industry needs leaders who are curious about the world, willing to learn and experience new things, and have high ambiguity tolerance, excellent people skills, and vision, and are eager to innovate.

- Which specific projects, stretch or cross training assignments will increase this person's breadth and depth?
- What additional education or skills are necessary for this person's advancement?
- Should a mentor be assigned?

If you've identified someone who has (or has the potential for) what it takes to ascend to the top tiers of management, the information you get from the IDP process will help you get your arms around what needs to happen to prepare that person, along with a timeline for ensuring the plan doesn't fall through the cracks.

### LEADERSHIP DEVELOPMENT TRAINING EXAMPLE

Meanwhile at Sierra at Tahoe, 20 of the recently recommended internal candidates and successful external hires have been affectionately dubbed "the freshman class." Director of human resources, Melinda Stearns, tees them up for success with expectations and skill-based training. Her agenda includes introducing them to their department's operating plan and a "train the trainer" workshop where public speaking and interactive delivery techniques are demonstrated and practiced.

Another team-building experience for the freshman class is designed to fill the new supervisor's "Toolkit," including how to make the transition from team member to leader, how to coach and motivate, and how to comply with regulations and the law, a must in the State of California.

The pre-season cultural leadership orientation is

bolstered by John Rice when he personally acknowledges the career path of each new lead or supervisor. Rice explains, “It means something to them that the GM recognizes they’ve been doing an excellent job in the rental shop for two years and that I’m on hand to celebrate their promotion to supervisor.”

Rice ensures they understand Sierra at Tahoe’s philosophy and advises, “Your job as a leader is not to impress me, it’s to impress the people you are entrusted to lead.”

The expectation to develop interpersonal skills at Sierra is backed up with 360 degree feedback for leaders so they are fully aware of how they are perceived. The feedback complements the traditional performance review, highlighting successful behaviors that drive results. Executive coaching is provided to address necessary behavioral change as an investment in selected leaders throughout the organization.

### MENTORING VERSUS MANAGING

It’s true that when we were team members it was all about us. Once we become managers, it’s all about them. It’s not only flattering to be asked for counsel, it’s a leader’s obligation and privilege to take on the role of coach, leader, teacher, trainer, and mentor.

When contemplating the right mentor for your high- or greater-potential employees, make a distinction between the functions of *managing*, which is about accountability, and *mentoring*, which is about focusing on the person and his/her overall career by sharing knowledge and experiences, providing advice, and teaching, using a low-pressure, self-discovery approach.

A manager’s primary intention is driven by a specific agenda: to get the most out of employees in their current job, not their future potential. The mere mention of wanting to explore other opportunities might derail an employee/manager relationship. With a mentor, an employee can be free to discuss workplace issues as well as plans for future advancement. Can you see the inherent conflict?

Mentors provide perspective about what is important not only as it pertains to the job at hand but also what is important in a bigger sense, beyond the person’s current role. That insight and wisdom

means they often retain their role as mentor well into the employee’s career trajectory.

### COMMUNICATING THE PLAN

To communicate your intention for succession planning and leadership development, you’ll want to draft a document that outlines your purpose and how it benefits the team members and the resort. At its heart, succession planning is a deliberate, systematic way to ensure leadership continuity so the resort will not only survive but thrive competitively. Let employees know that, so they can feel a part of the bigger picture and more secure in their role.

And while you’re communicating the plan, be sure to also communicate the fact that nothing is written in stone. Employees, high potential or otherwise, should know they are not *guaranteed* advancement. Be clear that *they* must continue to perform with excellence in their current jobs and take proactive steps to prepare themselves for the future.

### AT THE END OF THE DAY

Leaving leadership development to chance and expecting that qualified successors can be found inside or outside the organization on short notice is “hope management” at best. Employees who are high performers in their present jobs and those who have high potential for leadership positions should never be taken for granted.

Engineering your team talent review and succession planning process is an investment in your resort’s infrastructure, communicating to your best performers that they are valued. Perhaps the biggest payoff is the peace of mind that accompanies giving your most promising employees a chance to excel and grow. It’s a legacy worth leaving. ■

*Laura Moriarty is the president of Tahoe Training Partners, a human resources and management training solutions consulting firm near Lake Tahoe, California, founded in 2007. A former senior human resources executive in the ski, hotel, resort, and gaming industries, Moriarty designs management tools, customized 360 feedback instruments, innovative training workshops, and accountably infrastructure for senior leaders and management teams.*

