



# SUCCESSION PLANNING

By Laura Moriarty, SPHR

## Essentials for a Sustainable Workforce Pipeline

Owner/operators may feel they have enough on their plate without adding succession issues to the mix. But sooner or later, one of your key employees is going to leave, and you may not see it coming. Do you have a plan for dealing with the transition, or will you have to scramble to find a replacement?

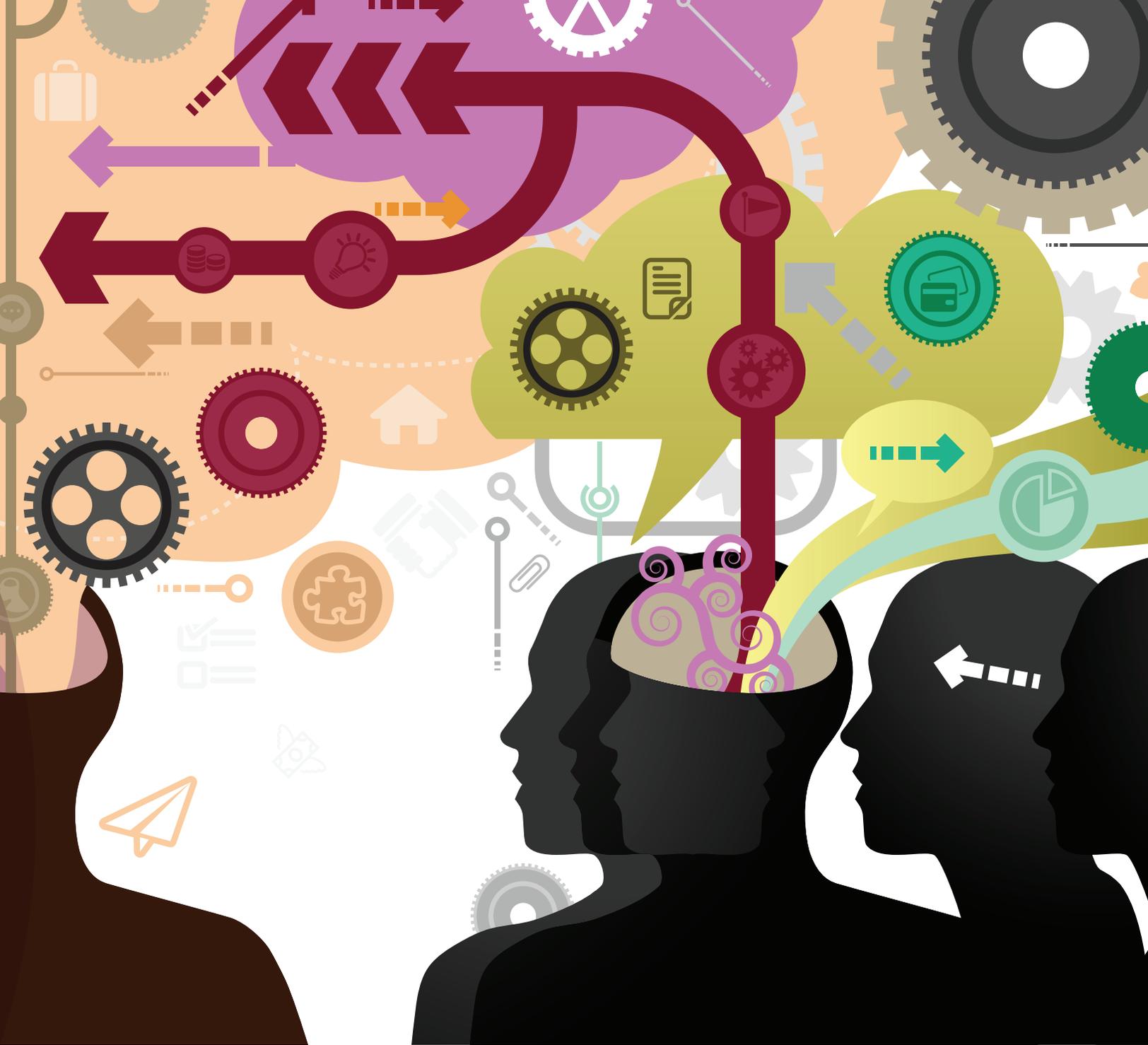
This is the first in a series of articles on how resorts of all sizes and descriptions can benefit from succession planning, leadership development, and mentoring. These subjects will be addressed in further detail in special workshops planned for NSAA's upcoming Winter Conferences and Tradeshows at Killington Resort, Vermont, January 20-21, and Snowbird, Utah, February 10-12, 2015.

**A** tightly knit, high-performance senior team is wrapping up its weekly meeting when the GM says the last item on the agenda is an announcement from the mountain manager. Everyone's attention turns to this longtime, valued employee, who proceeds to inform his colleagues he's been offered a position at a nearby resort and will be leaving in two weeks. Surprise, shock, and other mixed emotions begin to register on faces as he quotes the famous line, "They made me an offer I couldn't refuse."

Suddenly—in addition to juggling all the other responsibilities and stresses of running a resort—the leadership team has a huge challenge that needs to be addressed immediately.

Regardless of the time of year or reason for leaving, the unexpected departure of an essential member of the operations team can create stress, confusion, and uncertainty. Some resorts default to promoting an under-qualified replacement because there simply isn't anyone else who's been prepared to step in. That reactionary response is exacerbated if other employees decide to follow the individual who is leaving. Sound familiar?

It doesn't have to be such a hassle. If your resort has a practical process for talent development and succession planning—and a culture that places as much value on it as any other operational priority—you'll be prepared for a change in team dynamics. The transition can rejuvenate the leadership team and create a positive domino effect of open positions, creating a gateway to opportunities for pipeline talent prepared to move into the future.



### Roadmap Reality Check

A crystal ball isn't required to predict the future of your most talented people. They *will* move on when opportunity meets preparation, inside or outside of the organization (didn't you?). If you lead a team of people, you've probably been caught off guard by this, whether it was the loss of your top ticket seller, high-potential F&B supervisor, respected HR manager, or indispensable administrative assistant.

That's why it is so critical for resorts to have a roadmap for a viable succession plan. This resource fulfills three important objectives: It will help you 1) ensure you have a game plan for talent and leader-

ship continuity at all levels of the company, 2) assess and anticipate training and development needs, and 3) contemplate a retention strategy to manage employee engagement, growth, and advancement.

The last time you took a road trip, did you plan each detail or was it spontaneously inspired? If you had unlimited time and resources, you'd still have some idea of days behind the wheel and general whereabouts for overnight stays. You might justify, "Not to worry, I have a GPS and a credit card to pave the way."

By contrast, using spontaneous decision making to navigate leadership continuity at your resort is not

the best strategy; in fact, it's no strategy at all. Leaders don't have the luxury of unlimited time to explore talent continuity solutions, nor do they have one-size-fits-all talent for impromptu promotions. Your team members want to know how they fit into your plans. They, as much as resort leaders, need to be guided by the same roadmap and objectives.

### Getting the People Process Right

Season after season ski area operators prove they are extraordinary at managing unforeseen weather issues and the peaks and valleys of business levels. Their efforts can be categorized into three important overlapping functions (see figure): the Strategy Process, which includes investing in marketing initiatives and designating capital to update infrastructure and amenities; the Operations Process, which involves increasingly sophisticated contingency planning to anticipate and respond to daily challenges; and the People Process, the strategic discussion and planning for developing talent in the organization.

In their bestselling book, *Execution, the Discipline of Getting Things Done* (Crown Business, 2002), authors Larry Bossidy and Ram Charan assert, "The People Process is more important than either the Strategy or Operations process; if you don't get the People Process right, you will never fulfill the potential of your business."

Someone who clearly subscribes to that philosophy is Dave Rathbun, president and general manager at Mt. Bachelor, Oregon. Although the resort receives just under 500,000 skier visits—and with the conglomerate POWDR Corp as its owner—Bachelor acts small and entrepreneurial in terms of how it identifies leadership potential, cultivates these skills, and promotes people to positions that elicit

their best qualities. Rathbun deliberately challenges directors to identify technical and functional expertise and the interests of team members within their departments during the annual talent review process, concluding, "People are going to be good at things they are interested in."

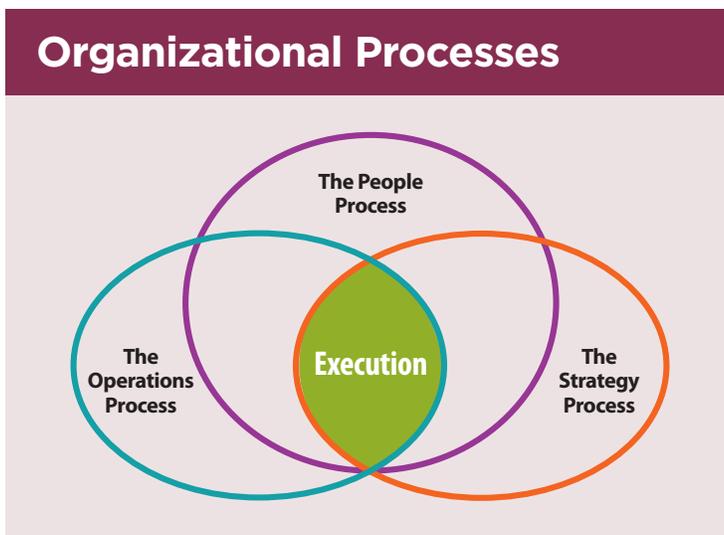
Rathbun has not hesitated to combine roles and responsibilities for high-potential team members, citing one person in particular as an example. "Amy Ohran in snowsports was a quiet leader with the best culture in the company," he says about the woman who would steadily ascend to the upper tiers of resort management.

Former lift operations manager Jordan Elliott agrees. Under Ohran's supervision as director of the snowsports school, the working environment was "a regular love fest," Elliott says, pointing out that Ohran fostered an atmosphere in which instructors respected each other and recognized one another's contributions using a peer program called "Caught in the Act." Ohran created buy-in by including instructors in developing innovative guest products, such as one of the first multi-day lesson packages, "Ski or Ride in Five," a beginner conversion program that helped Mt. Bachelor win the NSAA Conversion Cup in 2012. She also orchestrated snowsports school parties that were widely regarded as the biggest and best among the entire resort workforce, further instilling the sense of camaraderie and fun.

Ohran's inclusive, successful management approach didn't go unnoticed. Although recognizing that the challenge would initially fall outside Ohran's comfort zone, Rathbun promoted her to director of staff resources and development in addition to her duties with the snowsports school, confident that she would help spread the positive working culture throughout the resort.

In another important move, Mt. Bachelor decided to change the catch-all name of its Human Resources Department to "Staff Resources and Development," signaling emphasis on the cultural change. Ohran sees the "development" part of the title as a core element that drives engagement, noting that Bachelor has gained a reputation for developing snowsports professionals. "It's why applicants sought us out, stayed, and progressed through their careers with us," she says.

In Ohran's case, tackling the new opportunity helped prepare her for a promotion to president and general manager at Boreal Mountain Resort, Soda Springs Resort, and Woodward Tahoe for POWDER Corp. Ohran underscores the benefit of developing employees at all levels, adding, "We gain greatly ♦



improved workforce capability because they have skin in the game and a seat at the table.” This fosters commitment to the company and instills in leaders the responsibility to grow and develop their own key employees, or “direct reports.”

### Every Size Resort Needs a Plan

People seek out jobs at other ski areas or other industries for different reasons, and it’s no secret that ski area wages vary depending on the region. To help incentivize retention, Mt. Bachelor installed a three-tier Leadership Excellence Program for emerging leaders, supervisors, managers, and directors.

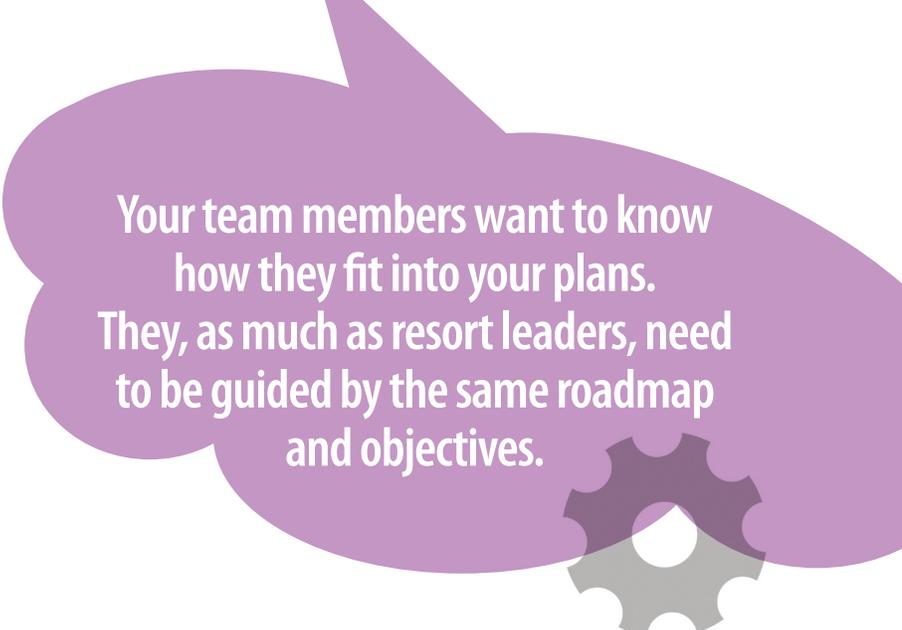
Participants first complete the “bachelor” level in which they learn supervisor skills and compliance topics. Then they advance to the “masters” level to learn the nuts and bolts of ski area management. At the “graduate” level they are exposed to strategic ski business management. Graduates who demonstrate mastery and delivery skills they may become “guides,” able to teach content from the first two tiers.

“The intention has been to ready the next generation of leaders, prepare them for growth, and celebrate their successes inside or beyond their employment at the resort,” Ohran says. Dave Rathbun concurs: “Now, ‘graduates’ can leave the region for another resort, or stay and open their own river rafting company. We’ll help them and backfill the position.”

Mt. Bachelor’s leadership development program and succession planning process is now being fine-tuned by Jordan Elliott, who had created his own “love fest” in lift operations when Rathbun tapped him to succeed Ohran as director of staff resources and development. Elliott and both of his full-time team members will earn their Professional in Human Resources (PHR) credentials by taking a comprehensive exam that affirms mastery in the disciplines of HR in the coming months.

Another resort that is intent on developing leaders is Homewood Mountain Resort in California. Its mission statement, “Share the View,” refers to more than the spectacular view of Lake Tahoe enjoyed seasonally by 100,000 visitors. The expression could just as easily describe management’s decision to share the view with a population that is often excluded from management meetings and earning incentive plan rewards, says Kathy Chan, vice president of human resources for the resort’s owner/operator, JMA Ventures.

Most resorts invite senior and next-level management “into the tent” but don’t include emerging leaders and front-line supervisors. This season Homewood Resort University—the resort’s supervisory



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development program—will teach this sometimes neglected level of leaders selected core competencies, including presentation skills and how to take the lead on the manager’s day off.

“You don’t always know intuitively who is going to rise to the occasion,” says Chan. “The outgoing, gregarious person is usually noticed, but the reserved, thoughtful person can be a surprise.” Resort leaders believe the investment instills confidence in these employees and that preparation helps make them the right fit.

Chan notes that some small resorts struggle with beefing up their bench strength for a number of reasons, although arguably they need it the most because they generally don’t have the larger corporate resources to help with the process of finding and training talent. “Ironically, often the excuse is that managers do not have enough time to train, so they end up doing everything themselves,” she adds. Although not everyone is seeking the path of leadership, managers need to learn to identify those who want to advance, Chan says. “If there is no obvious way to advance, the good ones will get bored and move on.”

Another approach to talent recognition and development is practiced at the resorts operated by Brian and Tyler Fairbank: Jiminy Peak Mountain Resort, Massachusetts; Cranmore Mountain Resort, New Hampshire; and Bromley Mountain Resort, Vermont. Tyler Fairbank, chief executive officer of the Fairbank Group, says he believes the company will remain in a position of continued growth and strength by “attracting and retaining key talent to broaden their experience and expertise.”

Key leaders at the three resorts are given the opportunity to both lead and contribute on cross-functional resort teams to drive initiatives. Deliberately created in part to bypass the overhead of a traditional corporate umbrella, teams representing safety, marketing, administration, human resources,

technology, snowsports, food and beverage, and guest service research and action planning serve all three resorts. “These assignments allow us to tap into their passion and keep them excited” as they build relationships and assist in operations at the three resorts, Fairbank says.

Fairbank, who also serves as president of Jiminy Peak, says he personally focuses on performance expectations and soft skills identified in the 360 evaluations of his direct reports, selected managers, and selected “up and comers” at the three resorts. The 360 feedback is gathered on a survey that is answered anonymously and confidentially by the direct reports and colleagues of individuals to identify strengths and opportunities for improvement. This feedback provides data for gap analysis (actual versus desired performance) that helps management assess development needs and a readiness timeline.

Fairbank looks at the individual’s technical skill level, budget capabilities, and whether he or she can manage an operation. He also stresses the importance of giving developing leaders what he calls “a real big something to own” when they are ready. One such example is former assistant marketing manager Burleigh Sunflower at Bromley Mountain, whose

obvious potential led to a promotion as director of ski and snowboard school with co-management responsibility for the summer Adventure Park. Sunflower also coordinates the company’s process improvement initiative, another “real big something to own” assignment.

### Balancing Top-Down, Bottom-Up Development

Mike Solimano, president and general manager of Vermont’s Killington Resort and Pico Mountain, has good suggestions for how to incorporate professional growth opportunities for everyone—from entry-level talent to senior leadership.

“Large or small, it’s a challenge to offer enough opportunity,” he says, referring to the contrast of providing opportunities at a mega resort like the “Beast of the East” with its sister resort, Pico, famous for the personal touch of a smaller mountain experience. To address the issue, management encourages job enrichment through lateral movement.

Having experienced the turnover of four lodging directors in as many years, Solimano recently looked to the seasoned, highly successful F&B director for the two areas, Scott Harrison, to absorb and lead the

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hospitality business rather than hire from outside. Promoting Harrison was a win-win, Solimano says. For Harrison, it created an opportunity for lateral mobility and professional development; for the lodging division, it brought the benefits of much-needed stability.

Killington, in particular, has a distinctly bottom-up approach, preparing students to work part-time while they are still in school. Green Mountain College in nearby Poultney has a satellite campus at the resort where the students live and attend classes on a variety of ski operations disciplines. Members of management foster the 10-year relationship with the school and its students by actively teaching classes. This year there are 22 graduates among Killington's year-round staff.

Solimano says there has been a more structured and systematic approach to succession planning at both resorts since Chris Nyberg was promoted to president and COO at POWDR Corp. in the fall of 2012. Bachelor's Dave Rathbun adds that "all of the general managers at our resorts have a little different DNA, coming from all of the respected functional disciplines including HR, finance, snowsports school, hospitality, marketing and sales, with Nyberg representing operations." To further the diversity, a conscious effort was made to balance male and female perspectives on the resort executive teams, which are traditionally male-dominated.

"At our first collective GM meeting we focused on long-term strategic planning and succession planning," Nyberg says. The group committed to instituting a company-wide program that identifies high performers (HPs), their development needs, and the next best positions within the company to enhance their preparedness. "Identifying these HPs early and providing work experiences and training is a critical success factor in our succession planning program," he adds.

### Developing Talent and Offering Mobility

An effective way to identify high performers and construct a plan for developing them into management material is to set up a formal talent review session (see "The Talent Review Session" and "Score Sheet," right). At the talent review, "you can't just go by your gut feeling," advises Judy Geiger, HR director for Killington and Pico. "Evaluating performance against defined

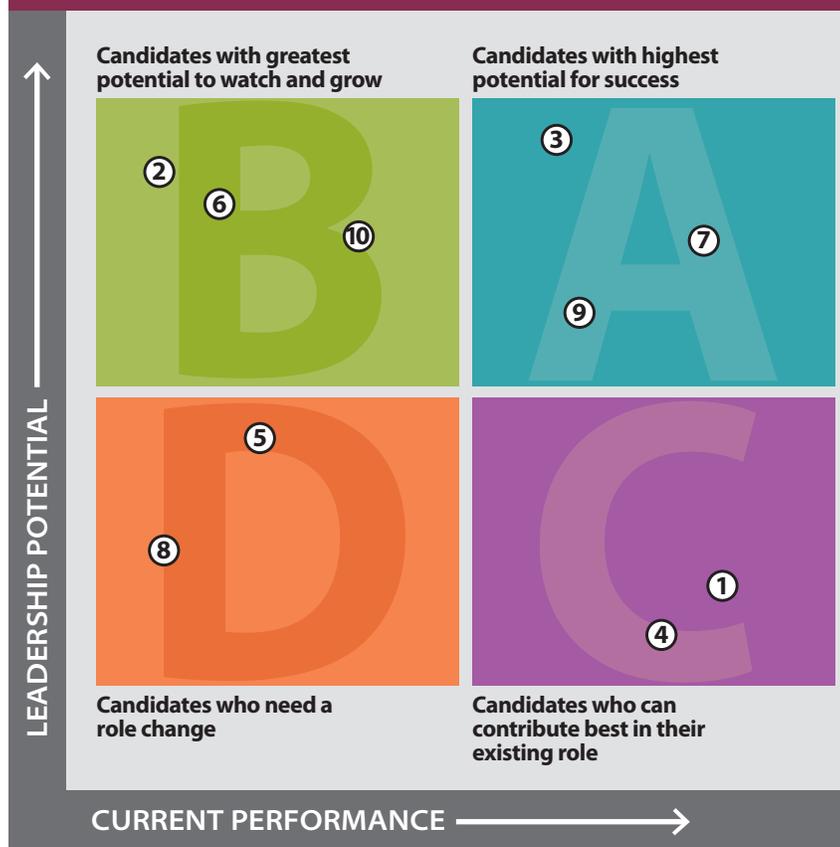
## The Talent Review Session

To set up your own talent review, plan enough time for an honest, introspective, and thorough discussion with key leaders of each functional area. Prepare questions for each leader to answer about existing talent in each departmental pipeline. Set up awareness and understanding that some leaders will be caught off guard when the candid opinion of a colleague differs from what they have observed about someone they have hired and supervised.

You may choose to place employees into four classifications of people who share similar levels of performance and potential for advancement.

- **"A" players, or "high potentials,"** are the rock stars that need to be noticed before they are cherry-picked by a competitor. The goal is to immediately set the wheels in motion to match their potential with the right opportunity, enhance their learning, and align their goals with leadership and resort priorities.
- **"B" players, or "greater potentials,"** are those who possess more talent than their current position requires. The goal is to convert their potential into reality with job enrichment opportunities such as cross-functional assignments.
- **"C" players, or "solid contributors,"** are perfectly satisfied with consistently doing an excellent job in their current position and have no intention of advancing. The development goal for them is to provide positive affirmation and an engaging work environment.
- **"D" players, or "limited potentials,"** consistently fall short of expectations. You'll want to consider whether the current role is even a good match, coach for performance, and address engagement. Keep in mind that when managers spend too much time and energy on non-performers they are distracted from focusing on those with greater potential. Don't delay, it's time to invite the "D Player" to work somewhere else. —LM

## Talent Review Score Sheet Example



key success factors mitigates the inherent biases we all have.”

Conduct the session with leaders who represent each functional area to ensure you don't overlook any potential rock stars, paying particular attention to the “A” or “B” player who is ready to advance. “We use consistent criteria as a framework to identify development needs so they will be ready for the next opportunity,” Geiger says.

The benefit of focusing on high-potential employees is channeling more resources and coaching toward those with the greatest promise. The risk is that you may overlook great people and alienate and frustrate the rest of the employees, which can impact morale and turnover. Employees on the development ladder at every level quietly simmer with disappointment if they have two or three years under their belt without accumulating more depth and breadth. Although there are distinct differences between the work styles, expectations, and career perspectives of younger and older workers, we all need to be given the opportunity to do our best work and to know we are making a difference.

Every job opening, including coveted manage-

ment positions, should be consistently communicated and posted enabling “internal mobility.” The absence of consistent postings means the mechanism to seek out new career opportunities is not transparent. The more positions that are filled in this manner, the more employees will distrust the job posting process and get the feeling that the system is fixed.

Managers should be mindful not to rush the process even when they are faced with an urgency to fill an opening. Equally important, they should resist the natural inclination to hire someone from the inner circle who is just like them. Selecting the wrong successor not only will jeopardize your brand promise internally and externally, it also may create a negative legacy for whoever chose the person.

One key area to address is the pressure that employee mobility puts on managers. After spending the time and money to hire, train, and mentor a team, the manager understandably wants to retain them. If an employee is transferred or promoted, the manager will have to start over by recruiting a replacement. While this is unavoidable and challenging, managers are beginning to see that mentoring and helping talent self-actualize is a higher calling. ♦

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stewards of the snowsports industry, resorts need as much talent, commitment, and expertise as they can generate to navigate all the challenges and opportunities that lie ahead. Are you helping develop tomorrow's leaders for your organization? ■

The skill is valued by leadership, and the reward is the feeling of pride watching employees spread their wings to leave the nest. Geiger notes that "culturally, our managers are more willing now to help team members advance than in the past."

### Conclusion

What's the sentiment about leadership development and succession planning in your organization? Resort cultures either promote or discourage advancement for all based on the presence or absence of mechanisms for learning, development, and mobility. As

*In the next issue, the author will outline specific criteria to use when conducting a talent review session, a format for individual development plans, and how to design, communicate, and implement the plan. Tune in for additional best practices in leveraging learning, development, and mentoring, and plan to attend the NSAA Winter Conference and Tradeshows for essential tools and demonstrations.*

*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 innovative training environments that prepare and inspire leaders to engage team members to deliver consistently extraordinary experiences for clients and guests.*

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