

## Clarity Paved the Way for a Federal Banking Institution's Formal Succession Planning

### Need/Challenge



A problem revealed itself in the Statistics Division of a Federal Banking Institution when executives disagreed concerning a candidate for a leadership position. A Clarity Consultant was asked to serve as a mediator. With more than 20 years' experience in human resources, organizational development, and training, she was able quickly to diagnose that the issue wasn't simply over one candidate. It was that the Statistics Division's cultural tenets, benchmarks for leadership competencies, and performance criteria for evaluating and grooming

talent were badly out of date. Limited training was available, but mentoring or coaching programs for developing talent were absent.

The challenges were to:

- Communicate to executives how culture was impeding their success and the careers of longtime employees
- Diagnose specific problems and roadblocks
- Help formulate processes and criteria for evaluation and advancement of high-potential employees
- Facilitate goal-setting and processes with executives in agreement for advancement and succession planning on both the leadership and technical tracks



### Clarity enabled the client to:

- Have a mediator in choosing a candidate for a leadership position
- Recognize lack of talent development programs and see the need for change
- Have the groundwork laid for formal succession planning

# SUCCESS STORY

## Solution: What Clarity Did

Between telephone and in-person interviews, Clarity's consultant was able to help the Statistics Division's leadership understand how their lack of formal succession planning had impeded career development for worthy employees, and created uncertainty for succession as long-time leadership prepared to retire.

The consultant facilitated a review of the Division's status quo assumptions and tenets, highlighting the need for change. She guided the client to examine anticipated needs, and to create statements for the mission and purposes for its succession planning, including an overview of future leadership and technical positions and their essential competencies. Together they reviewed the technical training, mentoring and coaching needs and opportunities, discussed feedback media, and formulated basic plans to communicate the new thinking to the Division.

The process was time-intensive and question-based, not directive, in order to accelerate the client's learning curve and to get them to invest in their solution instead of simply being directed. The consultant created written media discussing the process, its goals, and the future of the organization. Clients were then asked to consider the specific needs and skills that the organization's future roles would require. Their responses were enthusiastic, and many realized for the first time that their thinking about the future was in general alignment. This permitted the Consultant to lead them into detailed consideration of the functional and leadership competencies for tomorrow's professionals, managers, and officers.

## Results: The Outcomes

Briefly, the outcome was that the Federal Banking Institution's Statistics Division laid the groundwork for its formal succession planning, and helped smooth potential problems with disagreement and miscommunication. The basis for a customized dual-track Leadership and Technical succession program was created. Of perhaps even greater importance was the cultural evolution that this process initiated. Many longtime Division employees who had languished due to cultural inertia were given opportunities to develop new skills and advance themselves, for the good of the organization and for their own careers.

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“They didn't have a system for evaluating people and coming to consensus. It was all based on personal impression. My first tasks were diagnostic to detect communication lapses. Even before we finished our first conversation the client realized that the problem wasn't just a difference of opinion, it was that there were no structures set up; no due diligence; it was all subjective with no benchmarking on how to choose high potential employees and how to move them through succession planning.”

-Dea E., Consultant