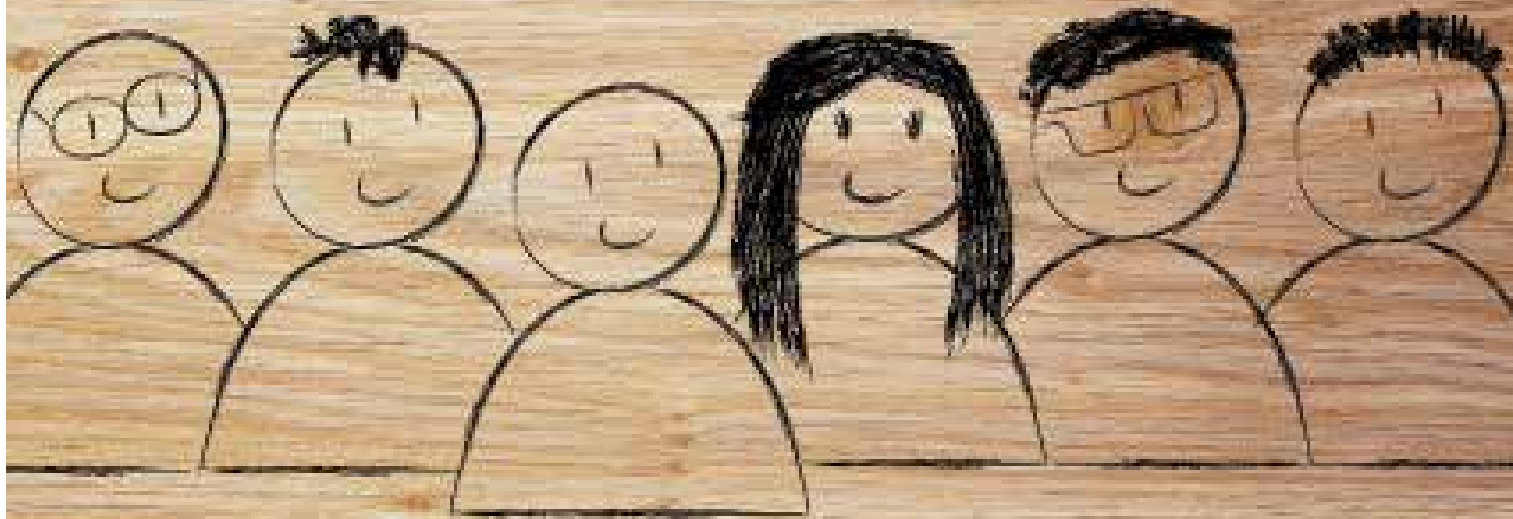


# Engaging the Whole Person in Succession Planning

BY SARAH DAHL



OUR PEOPLE, OUR STRENGTH

**T**here are two commonly seen staffing problems in co-ops that may at first seem unrelated:

At **Co-op A**, sales had been declining for the last few years. Personnel costs, unfortunately, had not been declining, leaving the co-op in a tough position. The finance manager, who had been with the co-op for the last 15 years, decided it was time to retire. The job posting went out, and résumés came in—but the only applicants with the same level of experience as the outgoing manager were used to earning twice as much as the co-op could afford to pay. That left the co-op with the option of either putting their fifth-choice applicant, with no retail experience, into this key position while hoping for the best, or considering even further personnel cuts in order to be able to afford the expertise needed in the role.

At **Co-op B**, Darnel was a cashier for two years. He started out as an excellent employee with a lot of energy and enthusiasm,

excited to work for a place with a great mission and where employees were treated fairly. He easily had what it took to become a leader in the organization. However, the two supervisor positions in the front end had been held by the same people for the last five and eight years, respectively, and the front-end manager had been there since the 1990s. After a couple years of the daily grind, Darnel settled into a routine of average performance and decided to go back to school for a graphic design degree, using his job at the co-op as a paycheck until he could do what he really loved—making art. As soon as he was able, Darnel quit his job and moved on, taking with him all his knowledge, skills, and, worse, his potential.

Although these two problems may seem to have nothing to do with each other, they both can start from the same source, and they both can be addressed in the co-op's staff development.

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## Our destiny?

These scenarios may be written off as just the way things go in our particular industry. Many co-ops' pay scales are homegrown, based on gut feelings of what is fair or simply based on what the co-op can afford. Even so, many co-ops do a good job of providing for employees' basic needs with living wage initiatives and a fundamental concern for the well-being of our workers. However, when it comes to filling higher level, key positions, such as the general manager (GM), IT director, and the like, qualified applicants are much harder to find. Larger competitors can pay a premium for the best mix of qualifications and relevant experience. When co-ops try to attract talent from the broader market to fill these roles, it is not unusual for them to make concessions in order to get someone somewhat qualified to agree to take the job.

At the same time, when turnover in upper-level positions is low, or there isn't a clear fit between an employee's true passion and the demands of the job, managers can struggle to think of meaningful goals to keep employees motivated and performing to their potential year after year. Turnover among high-potential staff becomes accepted as inevitable.

The most obvious solutions—allocate more money to higher-level positions to be competitive in the external market, or create more upper-level jobs for advancement—are just as obviously not doable in this increasingly competitive landscape. What hope is there for addressing the co-op's loss of high-potential employees and an inability to hire qualified staff for highly skilled positions?

## Rethinking evaluations

What if co-op management already knew that Luciana in grocery liked tinkering with computers and had been building her own website blog at home? What if there had been a way to find that out several years ago and to actively help Luciana develop her talents, even if that didn't immediately impact her work in the grocery department? What if the co-op could both bring more meaning and purpose to Luciana's work at the co-op by incorporating her interests, and have a ready applicant—already committed to the co-op and comfortable with the wage scale—for promotion to the IT department when a job became available?

The evaluation process is where we can start to address these two separate but related problems. Rather than managers going through the motions by handing down judgments on past performance and issuing uninspiring goals, evaluations can serve as time dedicated to connect with employees as individuals—to learn about what inspires them and what their life goals are, not just their goals for doing their current job better.

If you can engage staff to dream about what their best possible life would look like and then find ways to incorporate what inspires them into their daily work, employees can start seeing their jobs as bigger than just putting things on a shelf or running items across a scanner. Further, they can start seeing their employer as someone who cares about more than what the employee can do for them. These are two powerful aspects of employee engagement, which has been linked to everything from profitability and productivity to lower turnover and higher customer satisfaction ([http://www.factorhappiness.at/downloads/quellen/s17\\_harter.pdf](http://www.factorhappiness.at/downloads/quellen/s17_harter.pdf)).

Making this kind of exploration part of the evaluation process could also help identify sooner who could become part of a succession plan for key roles in your co-op. It also can help identify seemingly unlikely candidates for development into new areas. When a co-op can't afford to compete in the external market, its best strategy can be ensuring that it is developing its internal market. That way, when the co-op needs ▷



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## While traditional succession planning is still important in ensuring continuity, an employee-driven evaluation system can be the foundation from which succession planning occurs.

to fill high-level positions, it is less likely to be left accepting the lesser of multiple evils.

### Connecting creatively

The challenge is how to actually put this approach into practice. What do you do with the cashier who wants to be a graphic designer, especially if you don't even have a graphic design position in your structure and you're down two cashiers as it is?

The trick lies in finding some way to make employees' dreams and passions relevant to what it takes to make the co-op successful. Maybe it's giving that cashier a special project to design some visual aids for the cashier-training manual, or to work with marketing on creating some signage at the registers. Maybe it's allowing him to attend a workshop on Adobe or to have an hour a week off the register for a few weeks in order to come up with ideas for how to highlight sales items. Making these kinds of investments in staff, ones that actually resonate with what ultimately make them feel fulfilled, can be a win-win situation for both the employer and employee, helping to reduce the unwanted turnover.

In fact, a 2014 Linked In survey found that the number-one reason active job seekers are looking for a new job is to find greater opportunities for advancement. Rounding out the top reasons were: more challenging work, better fit for skill set, and more learning opportunities—all things that can be addressed by using evaluations for exploration.

### Employee-driven planning

Unlike traditional succession-planning programs, where key roles are identified and high-potential employees are slated to receive additional resources and development, the kind of process I'm suggesting is employee-driven. It gives agency back to the employees to say for themselves what they envision for their lives and how that can impact their time at the co-op. Managers often see only what immediate skills someone can showcase in their current position, which may completely overlook other skills or desires that could be developed to help the co-op as a whole succeed down the road. While traditional succession planning is still important in ensuring continuity, an employee-driven evaluation system can be the

foundation from which succession planning occurs.

To implement a truly employee-driven system, evaluations should start with a self-assessment in which employees are asked questions about their personal goals. Taking this further, employees can be asked to suggest goals for themselves in areas where their skills and interests can be mutually beneficial for the co-op and themselves. While for some people work really is just about having the steady paycheck, which in turn can provide stability to the department, others may want to move up or to move into a different area altogether. The only way to find out is to ask.

Staff may need a jump start to help them think about their work in the context of their larger life. Tools to help them visualize what the career paths are, and clear job descriptions that show where certain strengths are required, can be helpful. If your produce buyer is committed to promoting cooperatives and wants to be a department manager or general manager one day, she should be able to see what positions feed into reaching that goal. For example, she may want to work on developing leadership and supervision skills now, so that when a position opens up that could be a stepping stone, she is more likely to be qualified to get it.

Only as the last step, managers should review the employee's self-assessment and suggestions for goals, then work with the employee to ensure that the goals for the department as well as goals for the employee's own development are represented.

### Taking the first step

Even without a formal program of employee assessment, goal setting, career ladders, and the like, managers can always ask their staff at any time about what inspires them, what they really want to do with their lives, and what they are passionate about. And those managers should also ask themselves! It may take creativity to connect employees' responses to what goes on at the co-op, but if you try to make that connection, you'll help them see their work in a context that is more meaningful and engaging. Likewise, you'll be able to assess much earlier who really could make a career at the co-op and what skills they'll need to achieve, in order to grow tomorrow's leaders from within. □

#### Most important factors in seeking or considering a new job

#### Active job seekers:

- 1 Greater opportunities for advancement
- 2 Better compensation and benefits
- 3 More challenging work
- 4 Better fit for skill set
- 5 More learning opportunities

#### Passive job seekers:

- 1 Better compensation and benefits
- 2 Better work/life balance
- 3 Greater opportunities for advancement
- 4 More challenging work
- 5 Better fit for skill set



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