Day 6: DISC profile
Succession Planning

WELCOME!
DiSC Workplace Profile

Holly Sobota, Training & Development Specialist
Criticism
Organization
Authority/Control
Social Esteem/Being Liked

D
Being Taken Advantage of
Rejection

C
Criticism
Security/Harmony

i
Change/Conflict

S
D - Driver


Shapes environment by overcoming opposition to accomplish results.
**D-type**

**Strengths**
- Bottom line organizer.
- Places value on time.
- Challenges status quo.
- Innovative.

**Weaknesses**
- Oversteps authority.
- Attempts too much at once.
- Argumentative attitude.
- Dislikes routine.
What a D-type wants:

- Authority
- Prestige
- Freedom
- Direct answers
- Varied activities
- Assignments promoting growth
- “Bottom line” approach
- Opportunity for advancement
Interacting with a D-type

Do:

- Be brief, direct, to the point.
- Ask what, not how questions.
- Focus on business: remember D-types desire results.
- Suggest ways to achieve results, lead, solve problems.
- Highlight logical benefits of featured ideas and approaches.
Interacting with a D-type

Don’t:

- Ramble.
- Repeat yourself.
- Focus only on problems.
- Be too sociable.
- Make generalizations.
- Make statements without support.
Í. Influencer


Shapes environment by influencing or persuading others.
## i-type

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creative problem solver</td>
<td>More concerned with popularity than tangible results</td>
</tr>
<tr>
<td>Great encourager</td>
<td>Inattentive to detail</td>
</tr>
<tr>
<td>Motivates others to achieve</td>
<td>Overuses gestures and facial expressions</td>
</tr>
<tr>
<td>Positive sense of humor</td>
<td>Tends to listen only when it is convenient</td>
</tr>
<tr>
<td>Negotiates conflicts</td>
<td></td>
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<tr>
<td>Peacemaker</td>
<td></td>
</tr>
</tbody>
</table>
What an i-type wants:

- Social esteem and acceptance
- Recognition for abilities
- Freedom from details and control
- People to talk to
- Positive working conditions
- Opportunity to motivate and influence others
Interacting with an i-type

Do:

- Build a favorable/friendly environment.
- Give opportunity for verbalization about ideas, people, “intuition”.
- Help develop talk into action.
- Share testimonials from others relating to proposed ideas.
- Allow time for stimulating, sociable activities.
- Submit details in writing, but don’t dwell on them.
- Develop a participative relationship.
- Create incentives for task follow-through.
Interacting with an i-type

Don’t:

- Eliminate social time.
- Do all the talking.
- Ignore their ideas or accomplishments.
- Tell them what to do.
S - Steady


Cooperates with others within existing circumstances to carry out a task.
S-type

**Strengths**
- Reliable and dependable
- Loyal team worker
- Compliant towards authority
- Good listener, patient and empathetic
- Good at reconciling conflicts

**Weaknesses**
- Resists change
- Takes a long time to adjust to change
- Holds a grudge
- Sensitive to criticism
- Difficulty establishing priorities
What an S-type wants:

• Security in situations
• Sincere appreciation
• Repeated work patterns
• Time to adjust to change
• Limited territory of responsibility
Interacting with an S-type

Do:

- Create favorable environment: personable and agreeable
- Express genuine personal interest in them
- Be patient in drawing out goals
- Present ideas/departures from current practices in non-threatening manner
- Give S-types time to adjust
- Clearly define goals, procedures & their role in the overall plan
- Assure them of personal follow-up support
Interacting with an S-type

Don’t:

- Be pushy, overly aggressive or demanding.
- Be too confrontational.

Works conscientiously within existing circumstances to ensure quality and accuracy.
## C-type

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perspective: “the anchor of reality”</td>
<td>Needs clear-cut boundaries for actions/relationships</td>
</tr>
<tr>
<td>Conscientious and even-tempered</td>
<td>Bound by procedures and methods</td>
</tr>
<tr>
<td>Thorough in all activities</td>
<td>Gets bogged down in details</td>
</tr>
<tr>
<td>Defines situation</td>
<td>Prefers not to verbalize feelings</td>
</tr>
<tr>
<td>Gathers, criticizes and tests information</td>
<td>Will give in rather than argue</td>
</tr>
</tbody>
</table>
C-type  The ideal environment

- Tasks and projects that can be followed through to completion.
- Specialized for technical tasks.
- Practical work procedures and routines.
- Few conflicts and arguments.
- Instructions and reassurance that they are doing what is expected of them.
What a C-type wants:

- Autonomy and independence
- Controlled work environment
- Values of quality and accuracy
- Precise expectations and goals
- Exact job descriptions
- Planned change
Interacting with a C-type

**Do:**

- Prepare your case in advance
- Delineate pros/cons of proposed ideas
- Support ideas and statements with accurate data
- Reassure C-types that no surprises will occur
- Review recommendations with C-type in a systematic and comprehensive manner
- Be specific when agreeing; when disagreeing, disagree with the facts rather than with the person
Interacting with a **C-type**

**Don’t:**

- Refuse to explain details.
- Answer questions vaguely or casually.
SUCCESSION PLANNING
What is succession planning?
Succession Planning

A deliberate and systematic effort by an organization to ensure leadership continuity in key positions, retain and develop intellectual and knowledge capital for the future, and encourage individual advancement.
Why should we participate in succession planning?

- If we have employees ready, positions don’t stay vacant for long periods of time
- Institutional knowledge stays here
- Quality leaders
- Knowledge and process capture
- Minimizes disruption during transition
Employee Benefits

- Improves communication and morale
- Improved effectiveness
- Improve working relationships
- Personal/Professional growth
Elements of succession planning

Knowledge & Process Capture

Workforce Planning
Succession Planning is **NOT**

- A one time event
- Decided by an individual
- Used solely for individual career advancement opportunities
- Reacting only when a position becomes open
Replacement vs. SP

- Reactive
- Form of Risk
- Management
- Substituting
- Narrow Approach

- Proactive
- Planned Future
- Development
- Renewing
- Organized Alignment
- Flexible
PROCESS

Identify “Critical Roles” and critical knowledge & competencies

Assess talent’s potential, performance, and interest

Make a plan to develop individuals into critical roles & capture knowledge
Critical Roles

- **Key Contributor** - in achieving the organization’s mission or would hinder vital functions

- **Specialized Leadership** - The position requires specialized or unique expertise

- **Geographic** - The position is the only one of its kind in a particular location

- **Vacancy** - Position will be vacant due to retirement/advancement in the organization/lateral moves
9-block rating

- Process of assessing our teams in terms of performance *and* potential
- Conversational and thought-process provoking tool; not a decision chiseled in stone
<table>
<thead>
<tr>
<th>Performance</th>
<th>Potential</th>
<th>Low/Limited</th>
<th>Medium/Can be developed</th>
<th>High/Seeks new challenge</th>
</tr>
</thead>
<tbody>
<tr>
<td>EXCEEDS</td>
<td>7 - Key contributor</td>
<td>8 - Strong performer</td>
<td>9 - Star performer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>High performance, low potential</td>
<td>High performance, medium potential</td>
<td>High performance, high potential</td>
<td></td>
</tr>
<tr>
<td>MEETS</td>
<td>4 - Acceptable performer</td>
<td>5 - Core performer</td>
<td>6 - Rising star</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Consistent performance, low potential</td>
<td>Consistent performance, medium potential</td>
<td>Medium performance, high potential</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meeting expectations. Not stretching themselves. Valued, possibly as a specialist. Engage, focus, and motivate to identify potential blockers to higher performance/potential.</td>
<td>May have potential to move through lateral move or bigger responsibility. Highly valued employee, but needs to be tested to ensure capability is maximized.</td>
<td>Visible capacity and/or capability for progression. Needs clear personal objectives/new role or remit to drive performance up.</td>
<td></td>
</tr>
<tr>
<td>NEEDS IMPROVEMENT</td>
<td>1 - Unsatisfactory performer</td>
<td>2 - Marginal performer</td>
<td>3 - Emerging star</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Low performance, low potential</td>
<td>Low performance, medium potential</td>
<td>Low performance, high potential</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Performance/potential exit needs to be managed. Corrective action needed quickly.</td>
<td>May be new in company/role or mismatched obscuring ability in wrong role. Has potential to improve performance or take more responsibility. Test in role/consider move.</td>
<td>Possibly a novice/new entrant or new in role, showing high potential. Has demonstrated high potential in previous roles. May need to focus more on current position before a move.</td>
<td></td>
</tr>
</tbody>
</table>
Critical Role Planning

- What are the external and internal factors affecting this position?
- What competencies or skill sets will be required?
- Who (if anyone, can take this position?)
Development planning

- What are the gaps (competencies or skill sets not possessed by the current staff)?
- What strategies will be used to address the gaps?
KNOWLEDGE CAPTURE & DEVELOPMENT
What if we do all this work to develop our people and they leave?

What if we don’t and they stay?
QUESTIONS?