



Succession Planning

Using the

CDR 3-Dimensional Assessment Suite[®]

A Systemic Approach to Talent Identification & Development

Succession planning is a systemic approach for an organization to identify and develop key leadership and professional talent to assure continuity for sustained future performance success. This provides the mechanism to identify and develop talent from within to enhance retention, loyalty, customer relationships, competitive position, knowledge, and stockholder confidence.

The CDR 3-Dimensional Assessment Suite[®] is used at the front-end of the process to objectively identify the organization's current bench strength, as well as, to identify each individual's best strengths, acumen, vocational capability, emotional intelligence, competency fitness, risk factors (potential derailers), vulnerabilities, and incentive and reward needs. The individual capability assessments provide the management team with the framework for the candidate's best talents and suitability for specific promotional opportunities and upcoming key executive job vacancies. Additionally, the results provide a clear road map for developmental actions that reflect the needs of the individual in context with the key position requirements for which the candidate is expected to succeed.

Once the CDR 3-D Suite is administered to the respective talent pool, CDR uses the aggregate results to reveal the current bench strength of the organization. This analysis will show any gaps, gluts, and distinct strengths. A competitive benchmark analysis is also typically performed by CDR. These findings, used in conjunction with the client's strategic business objectives, provide a framework to determine what profiles are needed most to attain future performance goals.

Key Reasons for Succession Planning:	
<ul style="list-style-type: none"> • Identify highly talented individuals • Assure that talent is ready and available to lead organization towards continued future growth and profitability goals • Invest in effective employee development and prepares individuals for the future • Aligns talent and planned development with business strategies • Links talent development as integral part of strategic business planning process • Increase utilization of human capital assets • Improve key talent retention • Provides internal talent inventory management system • Means for knowledge transfer and retention to sustain business performance • Provides forum to determine length of job assignments and job movement needs 	<ul style="list-style-type: none"> • To ascertain internal job and environmental factors • Incorporates external environment and competitive factors into talent needs • Improves and productively addresses affirmative action and cultural diversity issues • Supports improved recruiting – knowledge of talent needs, market factors, attractiveness to top candidates, and more. • Manage and controls costs efficiently for talent development initiatives • Provides method to monitor and improve results in attaining diversity goals • Increase business and stock value – investors concerned with future and ability to fill top key positions • Provides a clear process to business survival and prosperity rather than leaving the future to chance and luck.

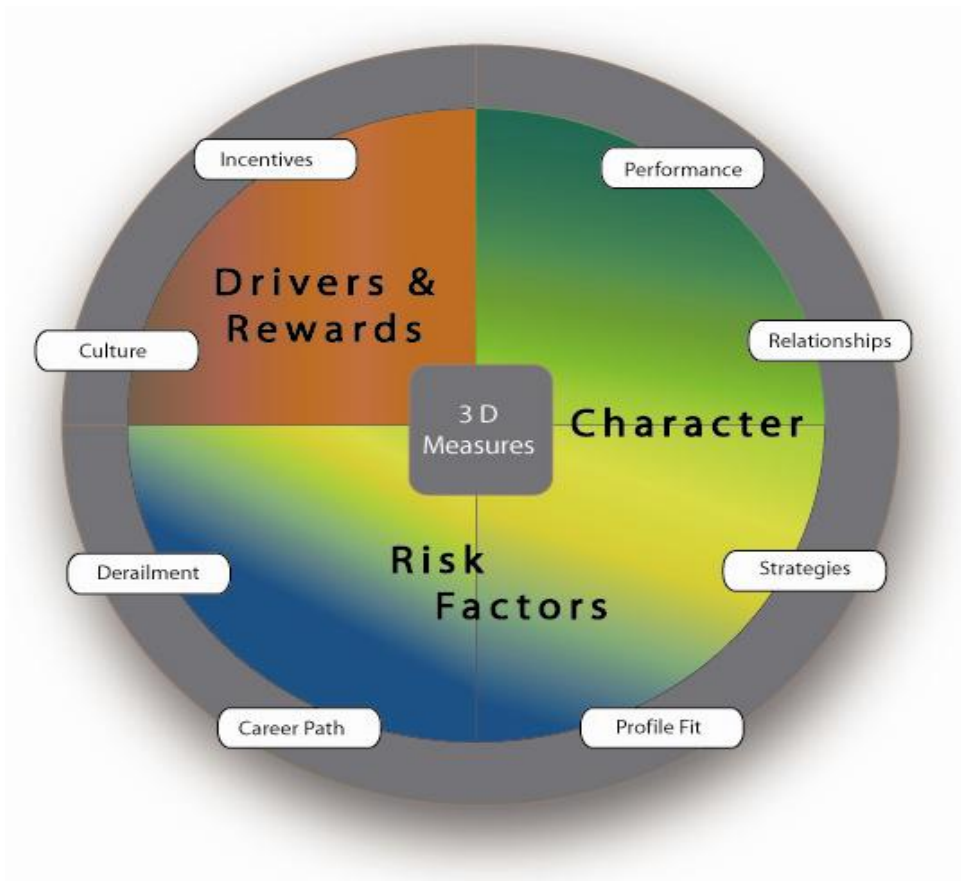
Steps in the Succession Planning Process:

1. Define mission and succession planning purpose.
2. Develop succession planning assessment process:
 - a. CDR 3-D Suite (bench strength analysis and individual succession assessment results)
 - b. Performance Inputs / Work Records / Tangible Results / 360 results
 - c. Individual Career Development Forms completed by candidate pool (reviewed with respective managers prior to submission to succession management teams)
 - d. Recommendations, interviews, other data inputs (temporary assignments, project work, etc.)
3. Communicate the process to all constituents.
4. Identify and focus on strategic issues (issues, challenges, opportunities, changing demands, etc.)
5. Establish or refine executive/leadership competencies
6. Identify key positions
 - a. Define job requirements for key positions
7. Establish method for evaluation of candidates
8. Determine what resources and developmental options allocated to plan
9. Form succession planning management teams; begin with senior management level
10. Management team meets to: Session 1) review bench mark study results in conjunction with business strategies, review process, establish schedules, and to fine-tune process evaluation criteria. Session 2) begin considering each talent pool high potential candidate.
11. Results for each candidate should be recorded to include potential positions, time frame for movement and development, types of developmental actions and experiences, feedback/mentoring process for candidate should be established.
12. Optional Recommendation: All high potential candidates should have a coaching feedback session with their own CDR 3-D Suite results to help them manage their own careers and development more productively and so that they have improved “buy-in” of succession plans pertaining to them.
13. Monitor and review the process regularly.
14. Management teams meet periodically to review progress and to consider new talent pool candidates.

Please note that this process works best when extended to eventually include all employees. When this is done, the process is an organizational talent development process. Those who are not promotable or interested in different positions can be used as mentors or in other teaching capacities. Or, perhaps they are provided with re-fresher or other training that helps them improve in their own daily performance. Perhaps they visit a customer, or accompany another professional area they frequently interact with. In any event, over time, this process should be a mechanism to provide systematic talent management and development for all employees as well as to cultivate the high potential leaders which is the primary purpose at the beginning stages of the process. In addition, in this way, the company does not create the “haves” and the “have nots” which frequently causes cultural unrest and turnover.

CDR 3-Dimensional Assessment Suite[®]

A Systemic Approach to Talent Identification & Development



Overview of the CDR 3-Dimensional Assessment Suite

The CDR 3-D Suite is a robust leadership talent identification and development instrument that digs deeper to get at what matters most about being the best. These break-through assessment tools equip executives to fast forward the succession planning process so that precious time, energy and funds are not wasted trying to speculate or develop candidates in broad or non-productive ways.

What is Measured?

The CDR 3-D Suite provides unique insights about one's

- character and leader acumen, forte, strengths, best-fit role(s), emotional intelligence, and more
- risks factors that can impede effectiveness, damage relationships and lead to derailment, and
- personal drivers, motivation, aversions, and values.

CDR 3-Dimensional Assessment Suite®

Character	Drivers & Rewards	Risks
Adjustment	Fame & Feedback	False Advocate
Leadership Energy	Power & Competition	Worrier
Sociability	Amusement & Hedonism	Cynic
Interpersonal Sensitivity	Humanitarian Efforts	Rule Breaker
Prudence	Companionship & Affiliation	Perfectionist
Inquisitive	Moral Platform	Egotist
Learning Approach	Safety & Security	Pleaser
	Business & Finance	Hyper-Moody
	Artistic Endeavors	Detached
	Scientific Reasoning	Upstager
		Eccentric

Why Use CDR Assessments for Succession Planning and Talent development?

Velocity. Fast forwards the process by immediately showing a clear-cut path to best leverage strengths, plan for development, and to neutralize risks and vulnerabilities. Clients' report shaving 1.5 to 2 years off the of the normal leader development cycle time.

Accuracy & Scope. No other tool comes close to specifically pinpointing the individual traits that define performance strengths, talent, gaps, risks, and motivation.

No Spin. The results are straight forward, hard hitting and accurate. There is no sugar coating or language to cleverly disguise the results. Strengths, talent traits, inherent risks, personal values are all revealed. This increases objectivity and minimizes the fall out of favoritism that plagues many succession planning processes.

Measurable Results. The CDR 3-D Suite was developed by correlating results to actual performance data. ROI is easily determined by capturing pre- and post use performance to confirm bottom line benefits.

Multiple Applications. In addition to succession planning, results can also be used for: leadership coaching, strategic team development, selection (new employees), incentive program design, human capital analysis, and more -- making CDR tools an exceptional value.

The Science. These tools are scientifically valid and are EEO neutral (having no adverse impact) and are linked to job performance.

Strategic Tools. CDR 3-D Suite reveals what talent exists so that talent can be productively developed and managed. Without CDR insights -- talent gaps, lopsidedness, damaging risk clusters, and underutilization can ruin even the best laid plans.

How are the CDR 3-D Suite results reported for Succession Planning purposes?

CDR Assessment reports are customized based on client needs and preferences. However, there are generally three types of reports. The first is the **CDR Bench Strength Analysis** giving executives a clear reading on their existing talent pool. The second is **Individual CDR Succession Planning Reports** for each candidate in the talent pool being reviewed. The last is a **CDR Succession Candidate Comparison** – where individual results are ranked or compared based on their CDR results. This is often linked with the organization's key competencies.

CDR Leadership Competencies & Bench Strength Analysis

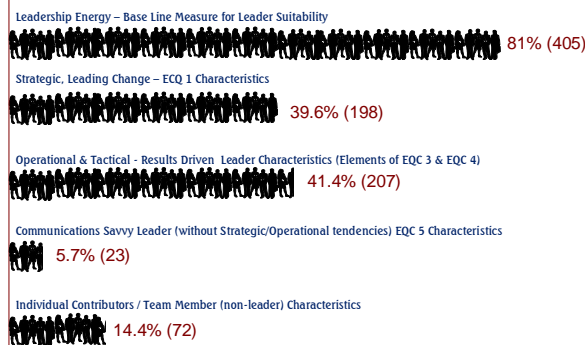
Leadership Capacity & Bench Strength Identification

Sort by Key Competency Groups:

- * **Universal Leader Characteristics**
- * **Strategic – Visionary Leaders**
- * **Operational – Results Focused Leaders**
- * **Communications Leaders**
- * **Individual/Professional Contributor – (Non-Leader Profile)**

Succession Planning Analysis Sample Findings (N=500)

Leadership Capacity & Bench Strength of Sample Company



CDR Leadership Competency Model

Strategic

- Sees Future
- Drives Change
- Break-Through Ideas
- Big Picture View
- Conceptual
- Flexible, Adaptable
- Idealistic

Universal

- Applied Ethics & Values
- Leadership & Accountability
- Communicates & Inspires
- Talent Advocate
- Expands Relationships
- Builds Knowledge

Operational

- Practical
- Process Focus
- Infrastructure
- Consistent
- Implement
- Organized & Planful
- Conscientious
- Guarded & Meticulous

The preceding slides provide a macro perspective of the initial leadership talent sorts provided by the CDR Bench Strength Analysis. What is important to note above is that CDR identifies what an organization’s strategic, operational, communications leadership capabilities and whether other professional strengths are found among the talent pool.

From there, CDR provides more specific results of clusters of talent, specific strengths, gaps, risks, motivational needs, etc. and compares to industry and general leadership trends. These results are typically graphic displays with descriptors and benchmark data may be included at the client’s option.

Individual CDR Succession Planning Report Samples

Below is an example of an output report for the CDR Character Assessment Report for a high potential candidate whose results most closely match that of an operational results leader. The report that follows is that of a candidate whose results most closely match that of a Strategic – Visionary Leader.

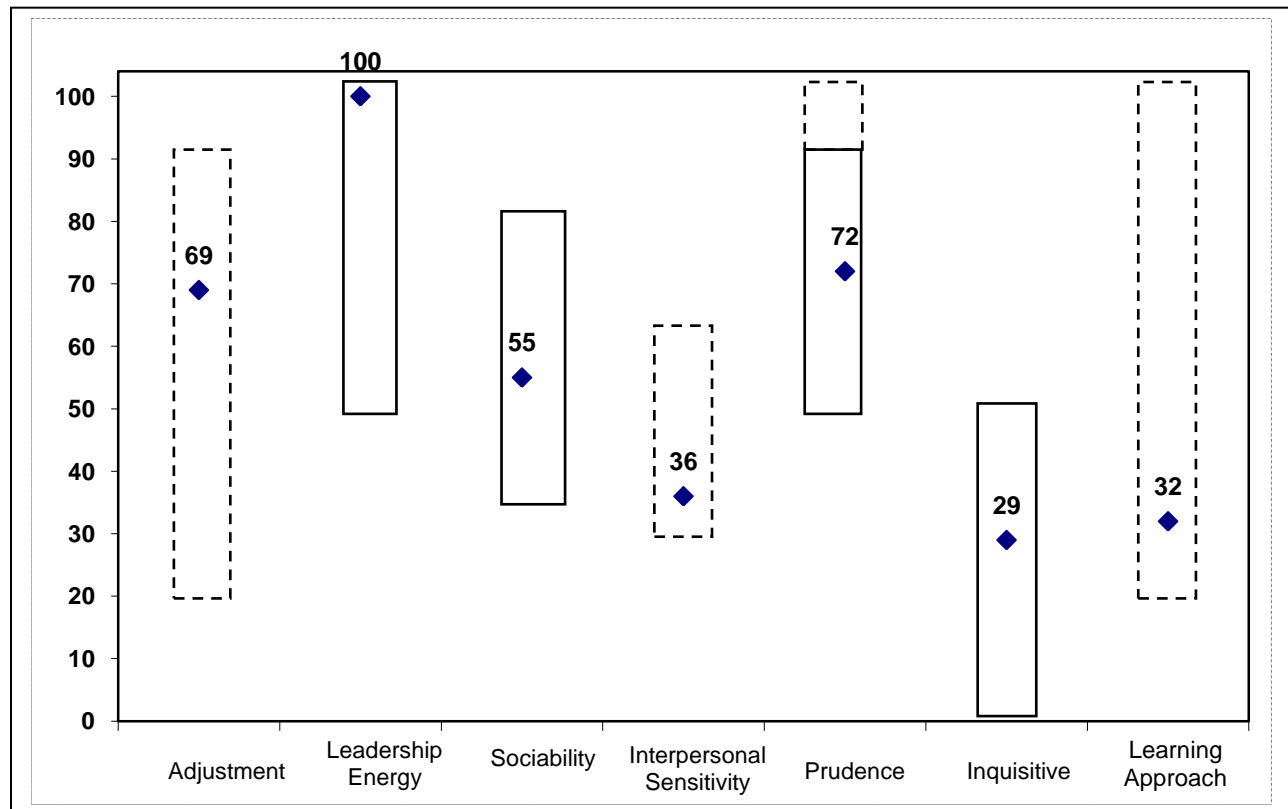
SAMPLE REPORT

**CDR Character Assessment
Executive Succession Planning Profile Summary Report**

Competency Focus: OPERATIONAL RESULTS LEADER

Candidate Name: Terry Sample

Company: XYZ Production



George Sample's CDR Character Assessment scores indicate that he does fit the overall profile of a leader with an operational-results focus.

For more details, review the full CDR Character Assessment interpretive report to understand specific scores and subscale implications, as well as to learn more about strengths, behavioral tendencies and developmental suggestions.

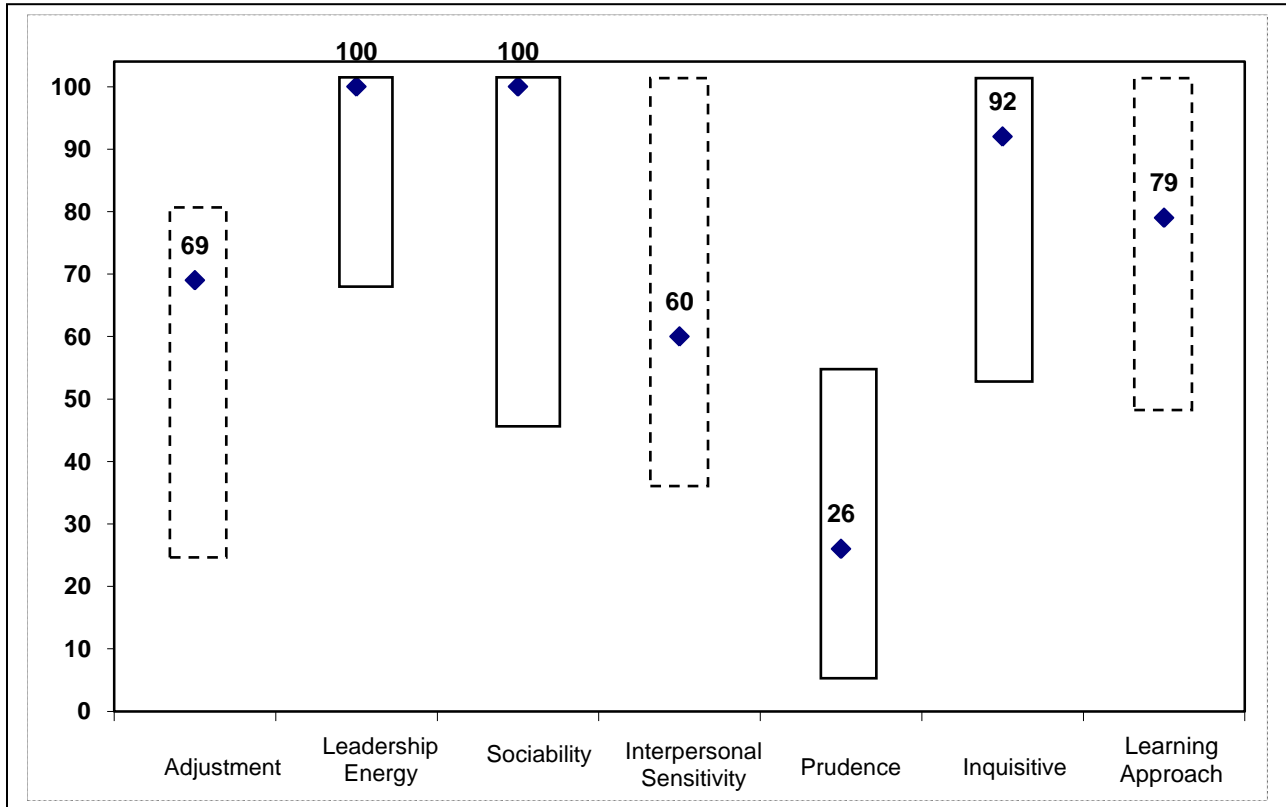
SAMPLE REPORT

CDR Character Assessment Executive Succession Planning Profile Summary Report

Competency Focus: **Strategic - Visionary Leader**

Candidate Name: George Sample

Company: XYZ Production



George Sample's CDR Character Assessment scores indicate that he **does fit** the overall profile of a leader with a strategic-visionary focus.

For more details, review the full CDR Character Assessment interpretive report to understand specific scores and subscale implications as well as to learn more about strengths, behavioral tendencies and developmental suggestions.

CDR Succession Planning - More Information

To learn more about how CDR Assessment Group, Inc. works with clients to design and customize their succession planning process incorporating their unmatched proprietary assessment tools, please contact one of our senior consultants to learn more or to discuss proposal development.