



## Management and Performance Associates – January 2010

### Planning the Year

*“Good resolutions are simply checks that men draw on a bank where they have no account.”* Oscar Wilde

The New Year is a perfect time for all of us to make plans. In our personal lives we make resolutions to start a diet, quit smoking or go to the gym more. Most often, as Oscar Wilde stated so eloquently, we very soon go back to our traditional ways of doing things—the resolutions forgotten or postponed another year. It’s also time to plan for the year in our professional lives: to draft our goals, engage our team in pursuit of these goals, plan for performance, enlist the staff in a new vision, etc...

Since we’re all currently in this planning mode, and to increase the chance of your resolutions’ success, we would like to suggest your plans include creating backups for you and your staff; if not for everyone, at least for your most critical positions. Most managers would agree that creating backups is important. In spite of that, most managers never really do anything about it. Why? Because it is important but not urgent.

Unfortunately, creating backups only becomes urgent when it’s too late, i.e.: when the incumbent of a critical position leaves the company in search of better opportunities; reorganization forces you to cut down on staff; a member of your staff takes a leave of absence for either personal or medical reasons, etc. Then, you have no one prepared to do the tasks that are critical, with the direct impact on your unit’s performance or deterioration of customer service . . . or both.

Actually, there is another good reason for you to create backups: staff development.

Here are some ideas when creating backups:

#### **1) Make a strategic decision**

Focus on what you want to accomplish. Why? Why this person? Why now? What are some of the disadvantages if I continue doing things as I always did? Answering these questions will bring you clarity on the benefits of creating backups.

#### **2) Select the right person for the right job**

Your candidate should have a combination of performance and potential. Performance is about executing the current tasks, while potential is about the ability to perform at an increased level of responsibility (if you are thinking for a backup for yourself), or at least to perform different tasks, with the same level of responsibility (if you are thinking about cross training). After complying with step number 3 below, you may want to “try it out.” For instance, you go on vacation and leave the candidate in charge of the department. Too much? Well, what about taking advantage of your absence due to a business trip, a conference or a training session. You could also send the candidate as a representative to a meeting with senior management. How did he/she perform? That’s the “proof” you’re looking for.

#### **3) Involve them in your plans**

Remember that you may have incredible development plans for your people, but they are based upon your beliefs and values. What is their perspective? Do they want to take on more responsibility? Do they want to be developed? The fact that you may answer yes to these questions does not guarantee they feel the same way. Some people are happy with their current level of challenge and don’t want more. Others have enough challenges in their personal lives and might shy away from more at the office. Careful: the fact that they don’t want more challenges and responsibilities does not mean you will move them to your “losers” list, as the most important question is: how is this person’s performance? If he or she is performing well there is no need for action, or for you to think less of them. Finally, be very careful to not create expectations of an upcoming promotion or transfer.

#### **4) Coach your team**

Don’t expect them to be miraculously ready by tomorrow morning. You will need to get involved. Start by assessing the current competencies of the person you have chosen. Then assess required competencies for the future position. Your coaching should concentrate on the gap, with ongoing



monitoring of the development. Also remember that a good coaching session is not about teaching them, but facilitating a process so that *THEY* can learn for themselves. Another critical point is that each session should end with an action plan: training sessions this person will attend, cross-training sessions provided by peers, an “internship” in another area of the company so that the person can learn new processes, or simply incorporate a more global view of the business.

#### **5) Review your plans constantly**

As scenarios change, so should your plans. New company directions and strategies as well as reorganizations in your department or company, might have added (or eliminated) critical positions. More importantly: How are the people you are preparing for backups reacting to their development plans? What needs to be adjusted in the plan? What new expectations or competencies are required for this position?

Following the above recommendations will help you prevent the next crisis when an incumbent of a critical position decides it is time to move on.

**See you next month. Suggestions are welcome.**

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