From Succession Planning to Re-Engaging Legacy Leadership

By **Isabelle St-Jean,** RSW, ACC

On the heels of BC HRMA's highly stimulating conference, we are called to re-ignite our workplaces by working with and integrating thought leaders' insights and solutions. This is how progress gets created: by harvesting and implementing the products of our observations, research and evolving conversations. With the current emphasis on the benefits of culture and innovation in the workplace, how can we respond adaptably and shift our perspectives on succession planning and the life transition that follows?

What makes it difficult?

An important step, in my view, is to name and acknowledge some of the factors that can make succession planning challenging. Finding the time to organize and take on these activities is difficult in the fast-paced work life. Creating the mental space of clarity conducive to defining the precise competencies of an occupation that is performed at an unconscious competence level is tough. Identifying the organizational values that may not be fully embraced in the day-to-day work life can be arduous. Making the kind of order that facilitates the assessment of needs and future resources does not happen without sustained focused efforts. Generating the leadership energy to lead this process to successful completion may be wearisome. And then, there is often a level of unease associated with the unknown that waits on the other side of succession planning: retirement.

The Shifting Retirement Paradigm

In my role as a business and certified retirement coach leading *What's Next* retirement to re-engagement seminars from coast to coast, I have repeatedly witnessed the angst among executives and professionals on the threshold of this major life transition.

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Among them, pre-retiring men in particular fear that their sense of status and identity as achievers, wealth generators and providers is about to be significantly eroded when they retire. An important part of preparing for this transition involves a redefinition of one's personal identity as distinct from one's professional role. Clarifying and integrating one's accomplishments, transferable skills, leadership qualities and passions will support a purposeful re-engagement going forward. The concept of re-engaging instead of "retiring" better appeals to a generation fully aware that a lifestyle primarily focused on leisure will not satisfy.

When approaching the time to organize and manage succession, many external tools and how-to models are available to lend more ease which tends to increase one's motivation to proceed with the planning. But what else can be of use? What internal attitudinal shift could one embrace that would organically lead to a gradual re-engagement that is sustained beyond succession and into "retirement"?

What if this shift could begin with a vision that includes a creative orientation to succession rather than seeing it a problem to be solved? Recalling the ground breaking book *The Path of Least Resistance: Learning to Become the Creative Force in Your Own Life*, Robert Fritz demonstrates that in business as in life, creating or bringing something new into existence is often more motivating and effective than using a problem solving approach.

What if, several years before succession planning, efforts were made to better redefine and align with core values on both the personal and business fronts? With clarity on what matters most informing our future, we can more readily take the initiatives that will help us to find new or continuing communities of belonging and engagements while making the best of remaining years at work.

The Paradox of Legacy Leadership

With humility and fierce resolve, as Jim Collins described in his work on Level 5 leadership, corporate culture can be collaboratively enhanced and better managed. This effort could turn out to be a foundational contribution in the spirit of proactively leading one's legacy. Although we typically think of a legacy as something that remains at the end of our lives, the ultimate legacy is to model alignment with values and the ability to tap one's full potentiality. This way of life requires more self-awareness and a willingness to be guided by our higher brain, the prefrontal cortex, rather than reacting from the reptilian, regressive brain. As we heed Dr. David Rock's suggestions in the realm of neuro-leadership, we naturally gravitate into progressive ways of behaving that prevents painful regrets in the future. What's more, we infuse our cultural capital with an infectious propensity towards excellence which includes renewed support for increased autonomy.

Fostering a Workplace Culture of Autonomy and Productivity

Among research reported in his book *Drive*, Daniel Pink makes the case for increasing employees' autonomy. According to Cornell University findings, 320 small businesses were studied, half of

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which granted workers autonomy, the other half relying on top-down decision. Results showed that businesses that offered autonomy grew at four times the rate of the control-oriented firms and had one-third the turnover. Consider then, what areas of autonomy could perhaps be developed that would later facilitate succession planning?

Just as Cathy Fulton's excellent article on "Cultural Capital" in the Spring 2012 issue of *PeopleTalk* clearly shows that a well-managed corporate culture fosters positive engagement and strong organizational performance, it follows that talent is better attracted and retained in such a workplace. Hence, succession planning is yet easier when employees are loyal, engaged and eager to pick up the baton. In the Grand Finale years, legacy leadership can generate a sense of satisfaction, of having made a lasting difference which in turns invites peace of mind and a future of happiness.

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