Who's Up to Bat?
Planning for Your Organization's Leadership Lineup

Mark McDaniel, CEO Cinnaire
Rob Edwards, Partner & Industry Practice Leader, Plante Moran
Stan Hannah, Ph.D., Principal, Plante Moran
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AGENDA

• Moderator Comments and Introductions
• Mark’s Reflections on Cinnaire’s Journey
• Cinnaire’s Roadmap to Building an Inspiring Culture
• Succession Management – What is it?
• A Methodology on Developing Your Next Generation Leaders
MODERATOR COMMENTS

- Introductions
- Roundtable discussion
- Audience to engage throughout
- Last 15 mins. for general Q&A

Mark’s Reflections on Cinnaire’s Journey
Cinnaire’s Roadmap to Building an Inspiring Culture

- Delaware Expansion
- CEO Learning Lunches
- Plante Moran Assessments
- Annual Survey of Staff
- Speed of Trust Program
- CEO Succession Started

2014
- EQ Training Executive Team
- Staff Engagement Committee
- Cinnaire grows to 52 Employees
- Delaware Expansion
- Equity (E) Training Executive Team
- Staff Engagement Committee
- Cinnaire grows to 52 Employees

2015
- Name change to Cinnaire
- Compensation Review
- Year of the Manager (360s)
- EQ Training for Managers
- Buddy System
- Health & Wellness Program
- Cinnaire grows to 88 Employees
- Unlimited PTO
- Enterprise Risk Management
- Succession & Talent Planning
- Cinnaire grows to 88 Employees

2016
- Social Capital Positions
- Initiate Deep Dives
- Diversity Training
- Competency Development

2017
- Cinnaire grows to 88 Employees
- Social Capital Positions
- Initiate Deep Dives
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KEY THOUGHTS IN CINNAIRE JOURNEY

- Talent Development vs. Succession Planning
- Giving voice to people in the company
- Being comfortable with the outcome of asking staff for their opinions
WHAT IS SUCCESSION PLANNING?

- A process that ensures that the right people for the right positions are in place today, tomorrow, and ten years from now
- Incorporates best practices concerning recruiting, development, and retention
- Not just about the CEO

CONSIDERATIONS FOR BOARD LEVEL SUCCESSION PLANNING

- How important is it for candidates to possess previous industry-specific experience?
- What are the pros and cons related to hiring from within rather than seeking an external candidate?
- Do we have any internal candidates that are realistic candidates for this position?
DEVELOPING NEXT GENERATION LEADERS

IDENTIFY ORGANIZATIONAL CHALLENGES

Current Question – Mission AND Margin

Historic Question – Mission vs. Margin

Growth

Profitability

Innovation

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CREATE LEADERSHIP SUCCESS PROFILE

- Based upon the key organizational challenges, what are the key leadership success characteristics that leaders will need in the future?

- Prioritize these success characteristics to focus on the most critical criteria and avoid an “everything is important” mindset.

EVALUATE TALENT

Assessment Components

- Standardized Cognitive Tests
- Individual Structured Interviews
- Personality Questionnaires

- Problem Solving 12 min
- Numerical reasoning
- Critical thinking (untimed)
- Standard set of questions
- Customized questions by role
- Behavior based questions related to leadership behaviors
- Chronological review of experience
- Workstyle Behaviors
- Personality Traits
- Leadership Potential
**THE ROI OF TALENT MEASUREMENT**

**Four scenarios in which assessments can deliver a substantial return:**

- When a large volume of candidates needs to be sifted.
- When significant cost is associated with selection failure.
- Where there is a significant need for perceived fairness or objectivity.
- When input is required on where best to target learning and development.

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**FACILITATE TALENT REVIEWS**

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<thead>
<tr>
<th>Talent Roundtable Discussion</th>
<th>Succession Committee</th>
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<tbody>
<tr>
<td>Supervisor</td>
<td>Human Resources</td>
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<td>Plante Moran</td>
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**Candidate Rating**

- **Ready Now**: 4–5 years
- **1-3 Years**: Ready Now, 4–5 years
- **4–5 years**: Ready Now
- **6 + years**: Ready Now

**Key Role**

- **Ready Now**: 4–5 years
- **1-3 Years**: 4–5 years
- **4–5 years**: 4–5 years
- **6 + years**: 4–5 years

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CREATE DEVELOPMENT PLANS

- Accelerates successful onboarding
- Facilitates knowledge transfer and knowledge retention
- Articulates performance standards against business objectives

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LEADERSHIP CHARACTERISTICS FOR EARLY CAREER PROFESSIONALS

- Influencing skills
- Collaboration
- Agility
- Growth Mindset
- Accountability
Before You Go

Please complete your session evaluation!

You can find it in the Conference app.