

Social Relationship Succession Planning: A Neglected but Important Issue?

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SPHR Succession planning and talent management are issues that are taking center stage as many organizations struggle to prepare for, or weather through, waves of retirements. The aging global workforce, coupled with the downsizings that were engineered by many organizations in a cost-cutting mode some years ago and continue to this day, has eviscerated the talent pool of many organizations. While attention has been devoted to management succession planning as a means of building the bench strength of promotable talent and to technical succession planning as a means of preserving institutional memory and knowledge transfer, little attention has been devoted to finding ways to preserve and pass on social relationships that are so important to business continuity.

Leaders bring more to their jobs than the ability to get the work done. Experienced workers know the institutional memory of their organizations, and the memory of technical workers is particularly important in firms that rely on building upon technical knowledge to achieve success. Notable examples include medical researchers and engineers. In both cases, the knowledge that experienced workers take with them when they leave their organizations for retirement are valuable and are, in many cases, impossible to replace.

But experienced workers have also established social networks of professional contacts that pay dividends for them over the years. When these workers retire, these social contacts are lost unless organizations take steps to preserve them by encouraging workers nearing retirement to pass on their contacts and open doors for their successors.

What is social relationship succession planning, and why is it important? What model can guide efforts to conceptualize it? What methods may be used to preserve social contacts as workers prepare to retire? This article addresses these important questions, offering notes for future investigation.

What Is Social Relationship Succession Planning, and Why Is It Important?

Social relationship succession planning is the process of introducing successors to the professional contacts of individuals who are leaving their organizations to retirement. It is critically important to some work—such as sales contacts. And it involves more work than simply introducing people. To pass on relationships, individuals must arrange for the people to get to know—and, most importantly, trust—each other.

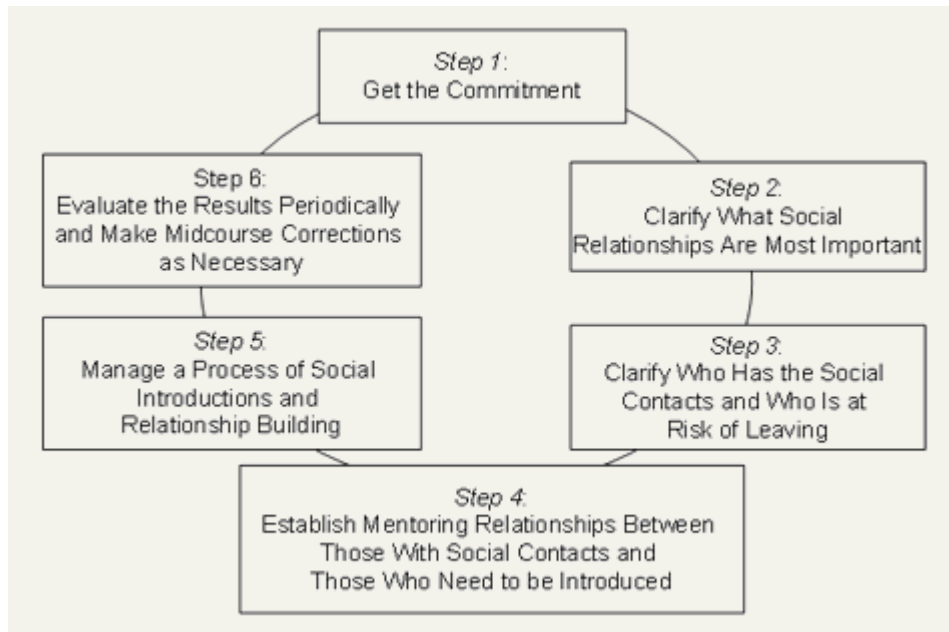
Social relationships are important for preserving relationships between an organization and its customers, suppliers, distributors, and other relevant groups on which the organization depends for success. Without making the effort to pass on these relationships, business can be lost—and productivity can suffer.

What Model Can Guide Efforts to Conceptualize Social Relationship Succession Planning?

A model is a simplified representation of something that is complex. Models guide conceptualization and are helpful to thinking about issues. Best practice firms use models to integrate the many components of a succession planning program.

Figure 1 depicts a model of social relationship succession planning. The steps in the model are described in the sections below.

Figure 1: A Model of the Social Relationship Succession Planning Process



Step 1: Make the Commitment

The first step is to make the commitment. That involves persuading top managers that it is worthwhile to try to capture the social contacts of key people in the organization. It also involves persuading individuals who have those contacts to identify them.

It is usually not difficult to persuade top managers of the value of identifying important social contacts and helping to pass them on. It makes much sense to do so.

The real challenge is convincing people who have social contacts to identify them and then serve as mentor for others. It must be clear “what is in it for them” to do so. After all, there is value in having social relationships, and by identifying those individuals may be giving up a cushion of safety. For that reason, it may be worthwhile to offer incentives to identify and sponsor this process.

Step 2: Clarify What Social Relationships are Most Important

Not all social relationships are important to a business. Only some are. If social relationships make it easier to communicate between customers, suppliers, distributors and other stakeholders and the business, then it is a value relationship. One place to start is simply to ask workers to suggest possible contacts they have among customers, suppliers, distributors and also tell why they are important.

Step 3: Clarify Who Has the Social Contacts and Who Is at Risk of Leaving

Once individuals have identified their social contacts, it is then necessary to examine the risk associated with the loss of people who have established these relationships. How likely are people to retire in the short term, based on their age? While it is not advisable to ask people whether they plan to retire when they are eligible to do, it is enough to identify those who

qualify for retirement in the future and then take steps to begin passing on their social contacts in preparing for their departure at some unknown time in the future.

Step 4: Establish Mentoring Relationships Between Those With Social Contacts and Those Who Need to be Introduced

Mentoring is a topic that has figured prominently in the literature on succession planning and talent management. A mentor is simply a teacher. The first mentor was Nestor, the kindly old man who oversaw the upbringing of Telemachus—Prince of Ithaca and son of King Odysseus—in Homer's *Odyssey*. Mentors are those who informally teach others and do not expect personal gain to result from what they do. For that reason, an immediate supervisor should not be a mentor.

Mentoring is necessary to pass on social relationships. The mentor makes introductions between their social contacts and likely successors. Their goal is to ensure that meaningful social relationships persist after they leave.

Both mentors and mentees require training to perform best. While some people are born mentors, it is best not to leave it to chance. Offer some instruction on what mentors should do and what mentees should do. Build the right expectations and skills to make the process work more efficiently.

Step 5: Manage a Process of Social Introductions and Relationship Building

Once the mentors and mentees have been matched up, make sure that they get along with each other. Also ensure that mentors are making social introductions of their mentees to those who can affect business results. It is usually best if mentors include mentees in their interactions with their social contacts so that trust can be established over time. Social relationships have not been established until both parties feel comfortable with each other—and can depend on each other.

Step 6: Evaluate the Results Periodically and Make Midcourse Corrections as Necessary

Someone in the organization must monitor the progress of social relationship building efforts. That is often someone in HR. But it does not need to be. Anyone can be assigned to audit how the social relationships are being established and whether those relationships are, in fact, being effectively established. Periodic reports from mentors are helpful in evaluating the results periodically. When need be, midcourse corrections may be made by finding new contacts or establishing new mentors to undertake introductions.

What Methods May Be Used to Preserve Social Contacts as Workers Prepare to Retire?

No single method should be used by itself to do social relationship succession planning. The reason: no one method will pick up all social relationships. One size does not fit all. Hence, several methods should be used in combination.

First, adapt the critical incident method for use with social relationship succession planning. Various versions of the critical incident method works for competency modeling, knowledge transfer and employment branding. It is just that the way questions are asked may have to be different.

To surface important social contacts, use these questions with individuals who are at risk of retirement and who occupy positions of importance to organizational performance:

1. Tell me a story about the most important person inside or outside the company you have ever met who has helped you in your work and in your job in this company.
2. What happened in the situation?
3. What makes that person so important to your success?
4. What special skills or competencies does that individual possess, based on your experience with him or her?
5. How can that person be reached? (What is his or her name and contact information?)
6. Would it be possible for you to arrange an introduction between another person in our company and that individual to explore mutual and future relationships relevant to the company's needs in the future?
7. Would you feel willing to serve as a mentor and advisor in that relationship?

Second, establish communities of practice around key issues affecting the organization. Choose both onsite and online methods to foster information-sharing—and relationship building. Post questions online to surface the names of social contacts that can be especially helpful in dealing with specific problems or issues faced by the organization. Then capture the names posted and keep track of them for future use.

To foster onsite communication and social bridge-building, host receptions in which social contacts can be invited or can phone in. Encourage participation by would-be mentors and would-be mentees. Emphasize the purpose of the meetings/receptions.

There are undoubtedly other approaches that could be used. Often such social contacts will figure prominently in mentoring programs, and that is one reason to establish and maintain such programs in organizations. Be sure to advise mentors to mention their social contacts. Be sure to advise mentees to ask for introductions to individuals who may be helpful to their future development and work performance.

Conclusion

Experienced workers establish social networks of professional contacts that help them achieve their work results over the years. When these workers retire or are gone from their organizations for extended periods, these social contacts are sometimes lost. To make succession planning programs more robust, steps must be taken by organizational leaders to preserve and pass on these relationships. That may be done through social relationship succession planning. Using mentor methods as a means to the end of social relationship succession planning, organizational leaders can pass on relationships that are vital to business success. As sophistication in succession planning grows, watch for social relationship succession planning to become more

common.

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