

# Succession Planning 101



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# Job Profile

Name: John Smith

Job – President

Reports to: CEO



## MIND THE STORE

Criticality 75

Time 70%

- Oversee strategic planning, budgeting, and forecasting.
- Review at 30k level—ask questions and stay informed with all departments
  - Financials
  - Policies & procedures
  - Promote internal promotions and hiring practices
  - Recognize problems and have solutions
  - Ask: Does what we're doing still work?
- Direct Reports: CFO, VP of Sls, VP of Ops
- Think about the future
  - Who are we today and what can we be. How do we fit in?
  - What are we doing and how should we be doing it?
  - what makes us successful?
  - what opportunities and challenges lie ahead?
  - Support the growth of the maintenance dept.
- Maintain and promote our corporate culture
  - Property visits
  - Regional Office Gatherings/Events

## BUSINESS DEV'L

Criticality 20

Time 20%

- Maintain relationships with current clients (they can call at any time)
- Check in with previous clients and potential clients (it's about long term relationships)
  - At least monthly/quarterly
- Participate in presentations of our services to potential clients
- Attend high level QBR
- Corporate Marketing

## VISIBILITY

Criticality 5

Time 10%

- Keep an open-door policy
- Take on any role in the company when needed or asked
- Face of the company—in and outside of the industry
  - Attend conferences and speak at conferences. Networking in the industry
  - Represent the company in the community with non profit work, various boards, etc.

# Values

**Hardworking & Conscientious:** Do what it takes to get it done. Work ethic. Dedicated.

**Integrity & High Ethics:** Do the right things for the right reasons.

**Empathy:** Cares for coworkers.

**Unselfish:** Give of themselves.

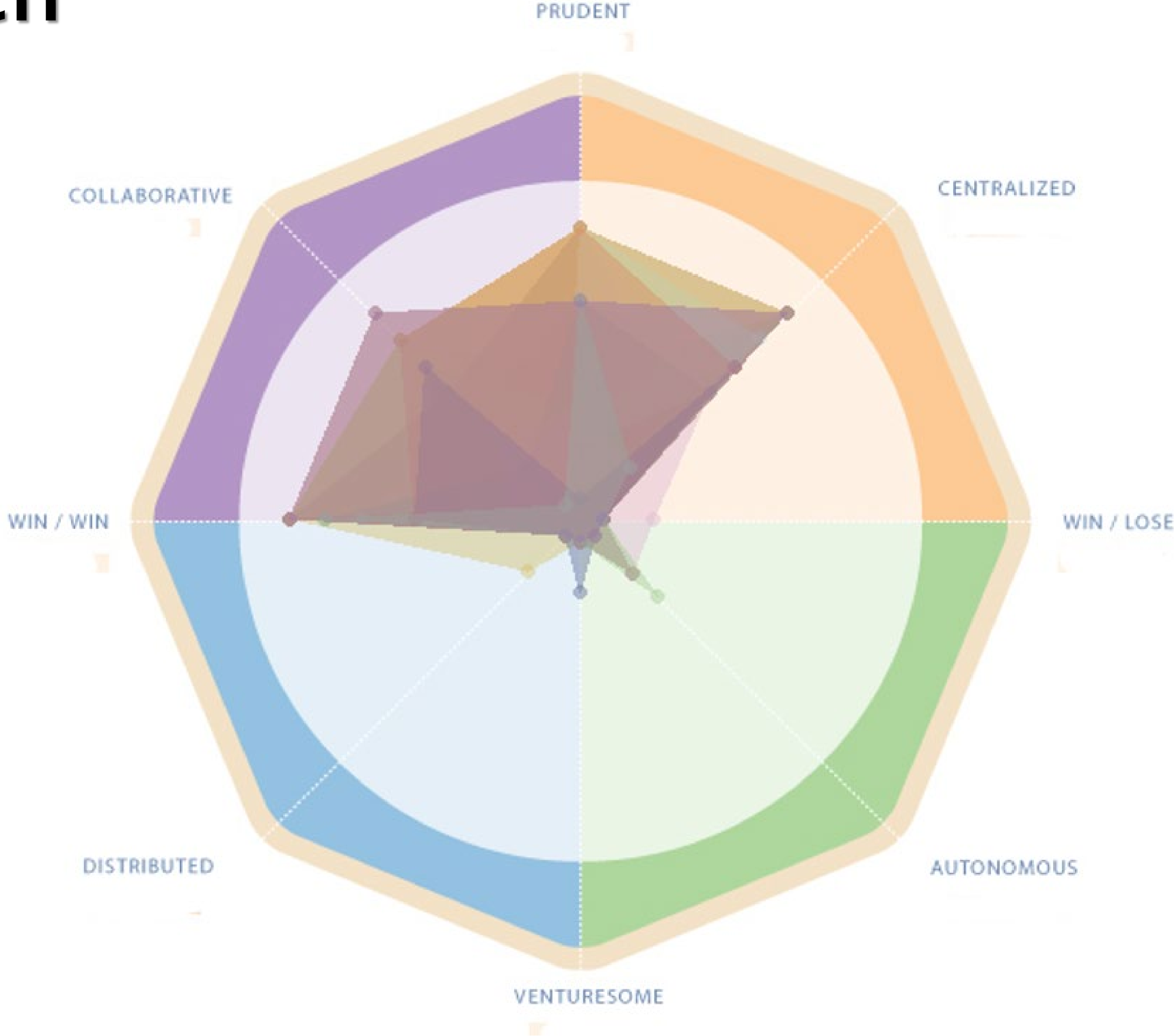
**Grit & Fearless:** Willing to take on challenging clients + true to one's self = Conviction.

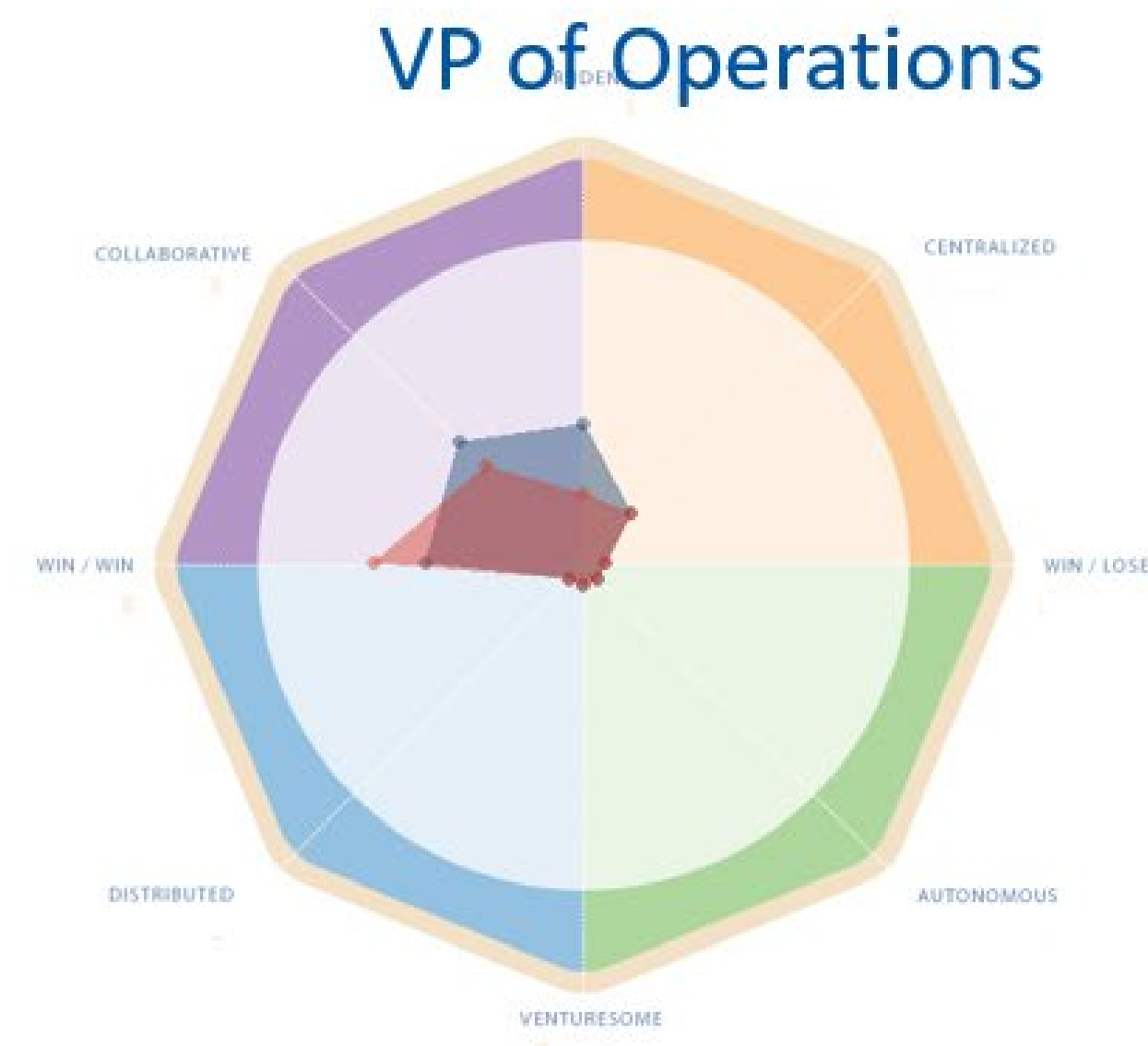
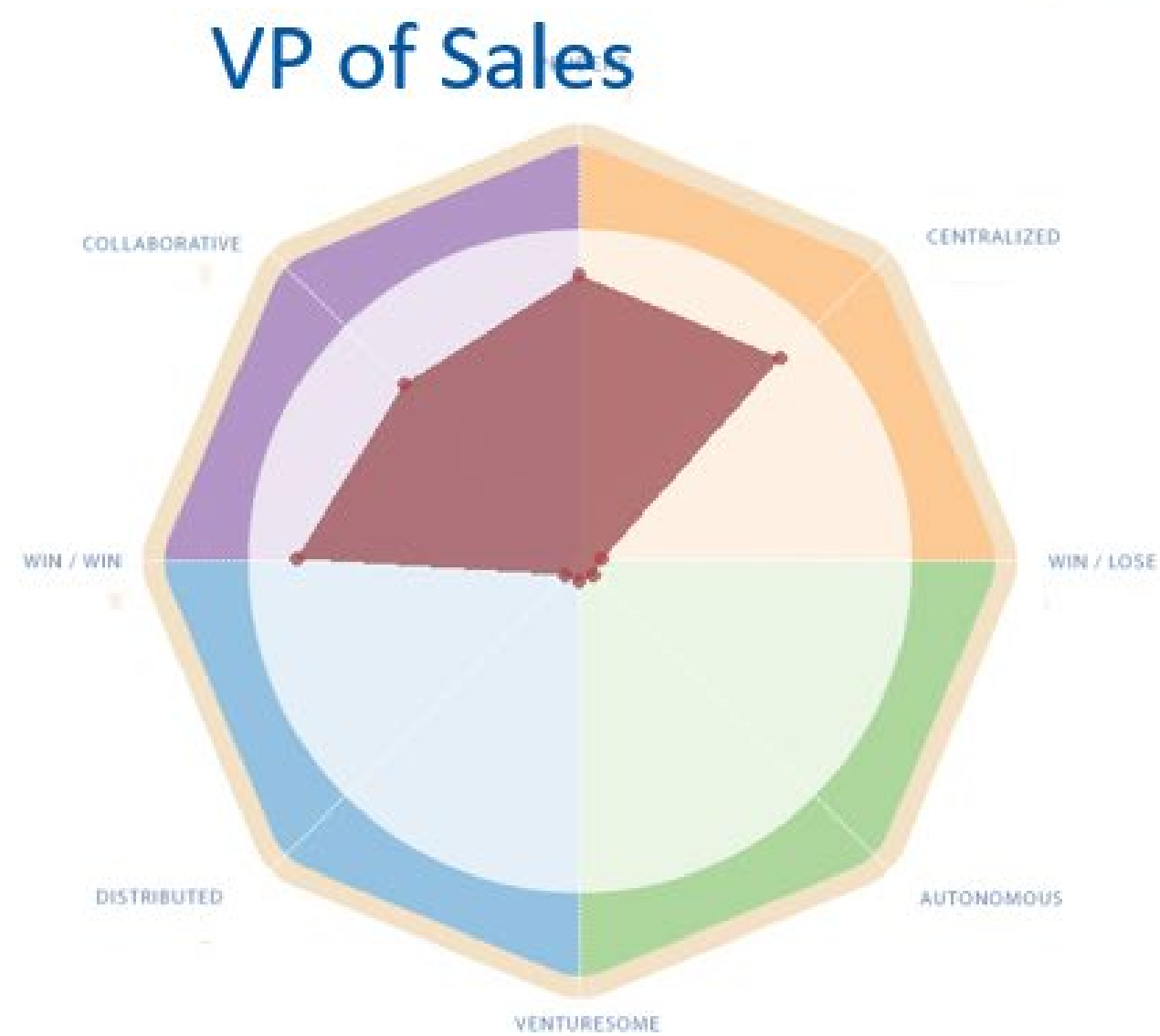
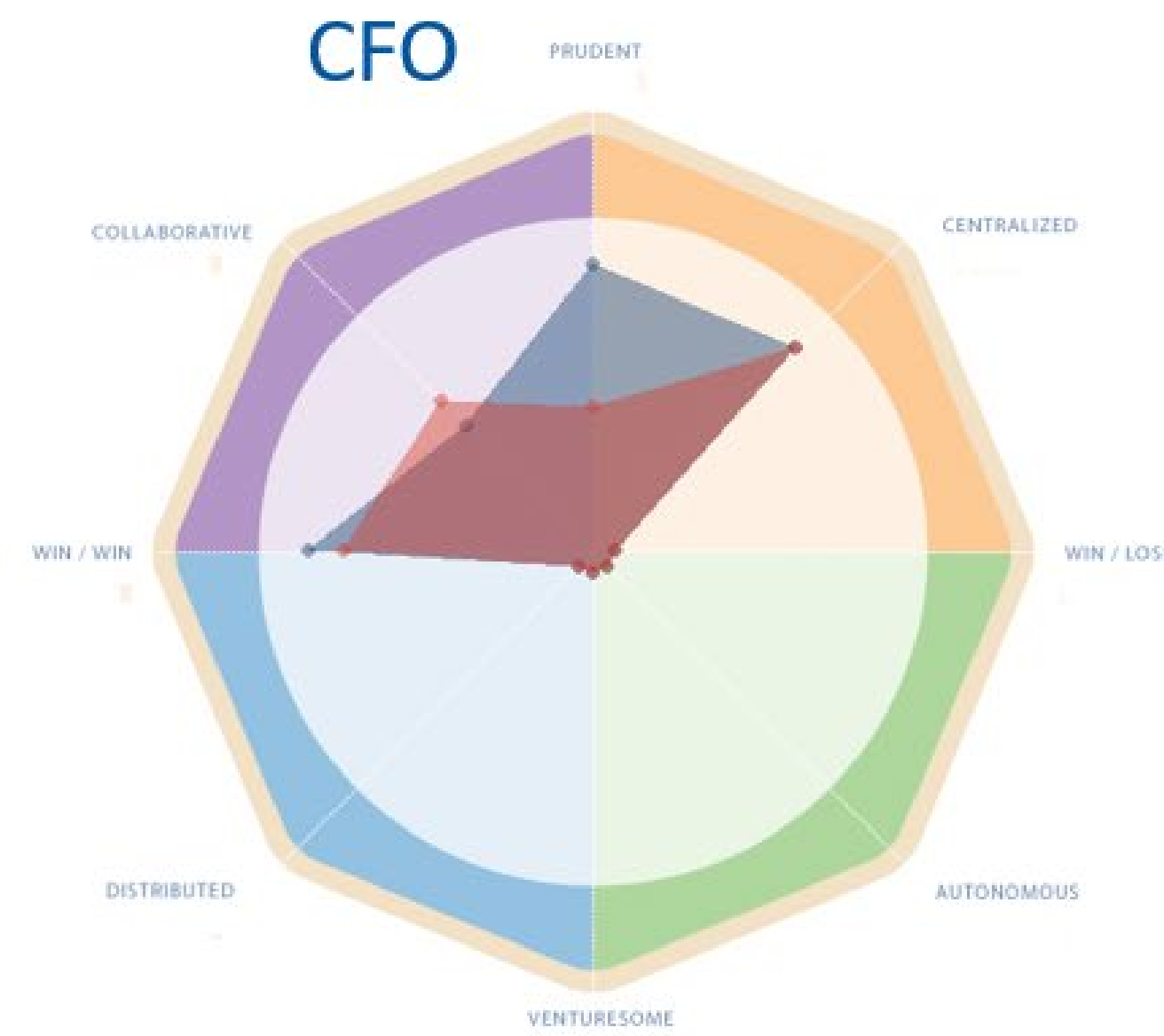
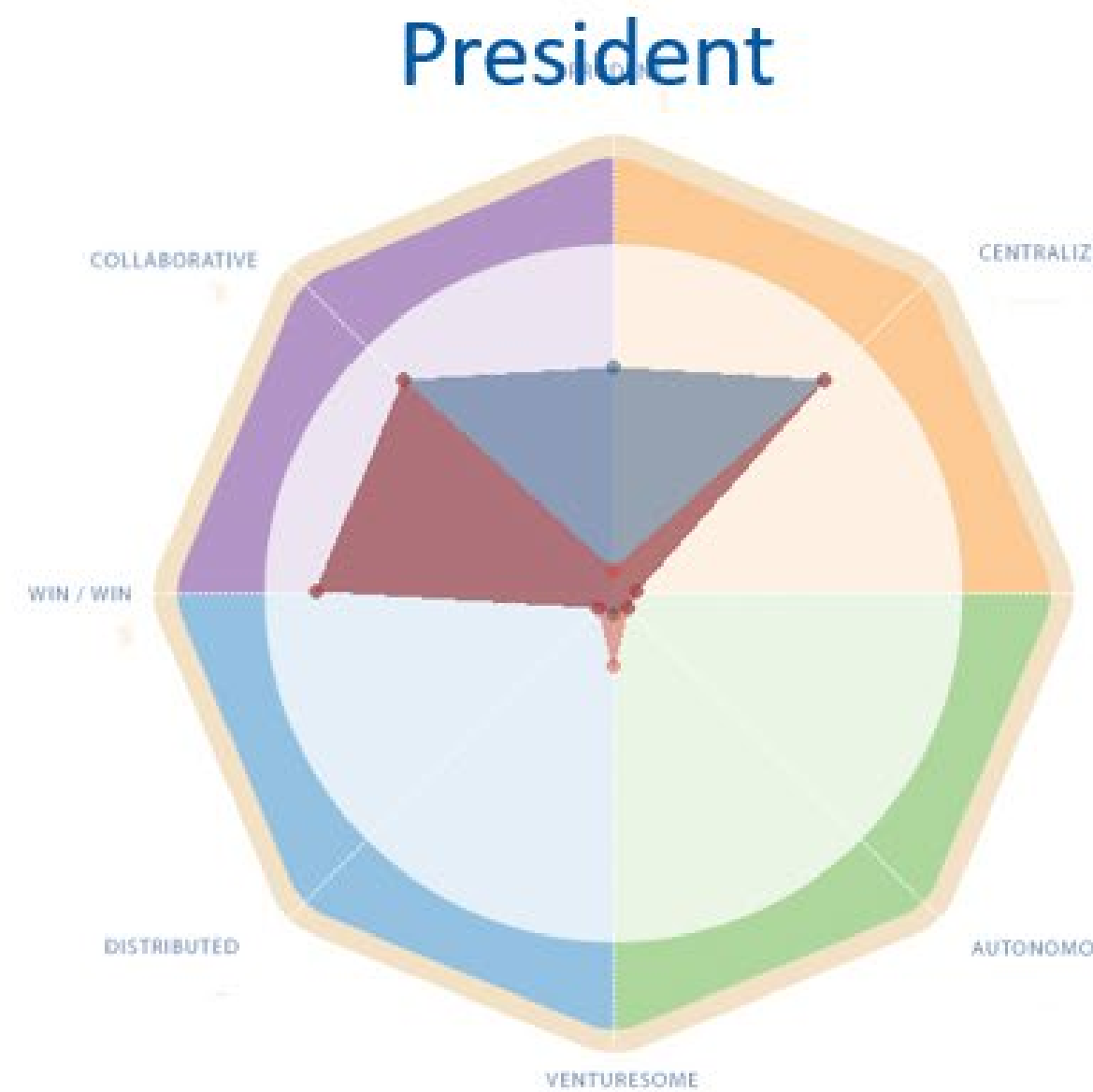
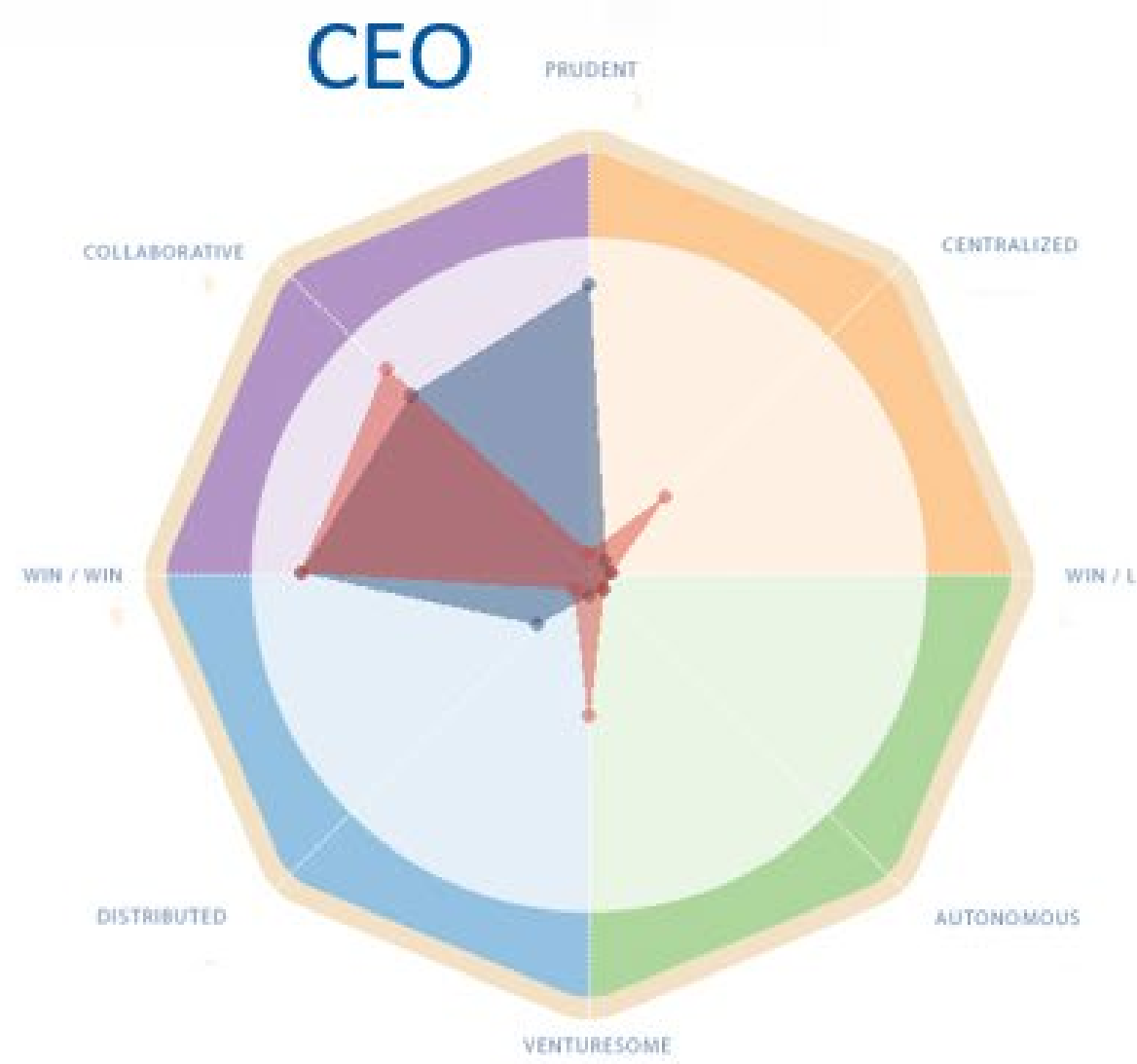
# Competencies

<u>Competencies</u>	Manager 1	Manager 2	Manager 3	Manager 4	Manager 5	Manager 6	Manager 7	Manager 8	Manager 9	Manager 10
Leadership	3.5	3.5	4.0	3.3	3.0	3.8	2.0	2.8	3.3	4.0
Presence: Sales & Communication	4.0	4.0	4.0	3.0	2.5	4.0	3.0	3.0	3.5	4.5
Connector (Networking)	3.5	4.0	3.5	3.0	2.5	4.0	3.0	3.8	3.5	4.5
Business/Industry Knowledge	3.5	3.5	3.5	3.0	3.0	3.0	3.5	3.0	3.5	4.5
Thinks Like a Client	3.8	4.0	3.8	3.0	3.0	4.0	3.5	3.3	3.8	4.3



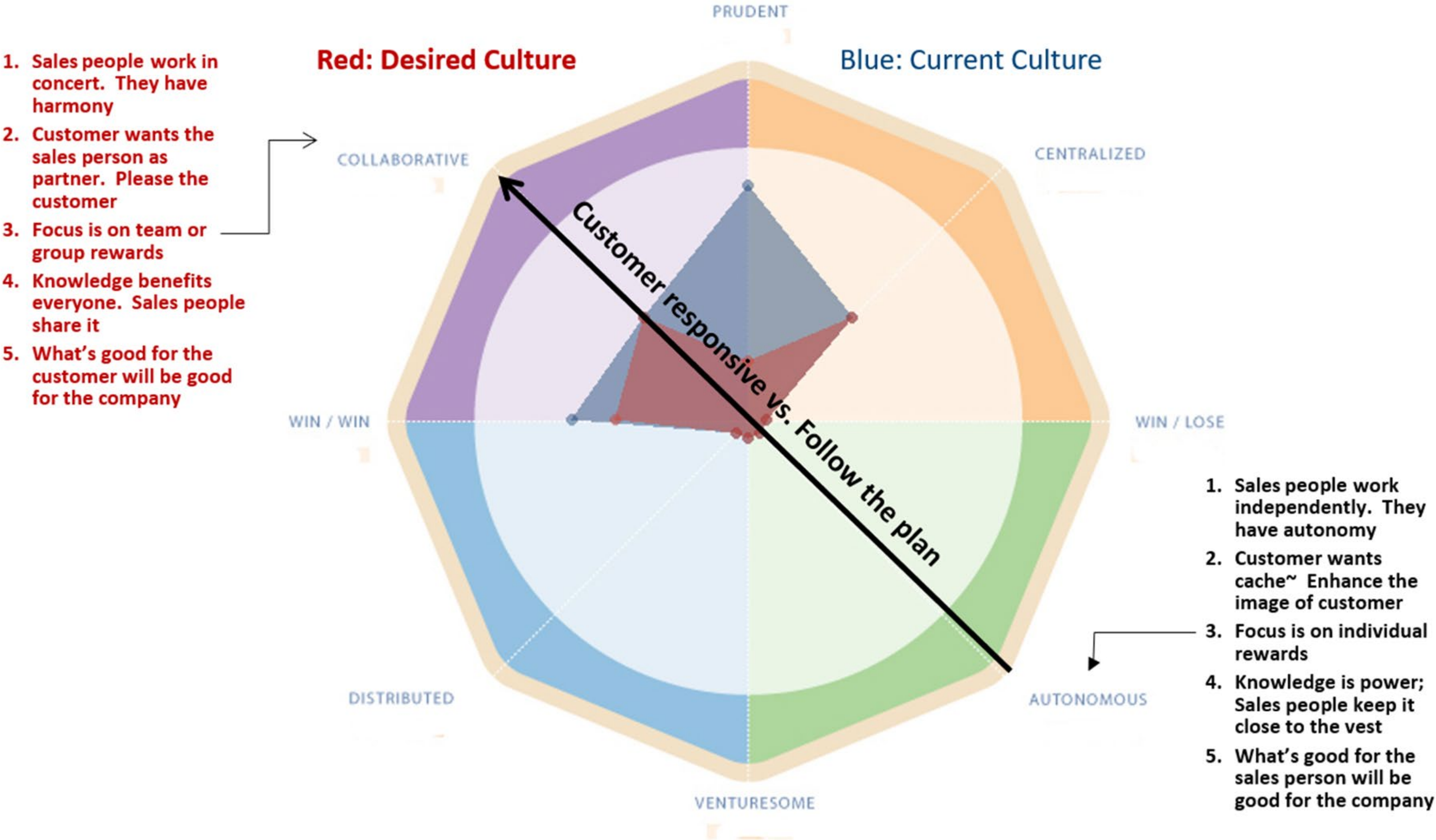
# Culture Match







# Sales Culture Preferences



# Three Key Learnings

The Peter Principle is a real thing.

Promoting from within has a much higher success rate over hiring from the outside.

When a company sets succession planning up right, it saves them millions of dollars. How? The right leaders in the right seats.



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