

Succession Wizard

... making succession planning simple.

Succession planning software to identify management succession issues within organizations

Succession planning is increasingly being seen as a growing influence in determining the success of an enterprise. Having an effective succession plan can ensure that an organization has capable and trained managers to guide its growth.

With the move to flatter management structures, succession planning is insurance for when key people leave the organization. With fewer layers of middle management available to fill these key roles it is important that potential successors are identified early and given appropriate training so that when the time comes for their move to more senior roles disruption is minimized.

The primary purpose of Succession Wizard is to simplify the whole succession planning process and to act as a tool to identify potential succession gaps within organizations. It does this by using a powerful, yet user-friendly, interface making it a simple program to use and enabling managers to easily identify which key positions are exposed.

The important thing is to create an ongoing and durable succession planning environment rather than something which is just looked at once or twice during the annual planning process.

A major benefit of using Succession Wizard over competitor products is that users can expect to be fully operational and producing effective succession plans within hours of implementing the solution. There is no need for expensive consultants to configure the software, or the need to purchase additional hardware as the application is designed for standard desktop PC's and can be setup by virtually anybody within minutes.

Key Features

1. Powerful search facility allows the database to be filtered in many different ways to allow specific criteria to be retrieved and candidates identified.
2. There are a number of ways in which Succession Wizard can be implemented. The program can be run over a network with information shared amongst a number of users; or alternatively on a single PC/laptop by an administrator looking after a number of business units or client organizations.
3. Reports displaying management planning information can be configured to match user-defined criteria.
4. Additional information such as job history, competencies, notes and photographs can also be easily added.
5. Information can be imported from other systems allowing existing information to be quickly added.
6. Intuitive design allows users to quickly benefit from program features.
7. A flexible package which can be customized to reflect individual business practices and terminology.
8. Try the complete program free of charge before deciding whether to purchase. The only limitation is the number of entries you are able to input is restricted; in all other respects it is the complete program.
9. 30 days free email / web support following purchase with optional annual software support also available.

What is Succession Planning?

- Making sure that the right people are in the right place at the right time in order to be as prepared as possible for unexpected events.

Why is it important?

- On average, companies will lose a third of their top management in the next 5 years.
- Organizations are now flatter and leaner, with fewer layers of middle managers available to fill key roles. To compound the problem, failure rates among executives hired from outside can be as high as 50%.
- Most organizations focus almost entirely on hiring and training whilst neglecting succession planning with more than two thirds of all businesses having no formal succession plan.
- Many senior management teams fail to develop in their successors the high-level skills and competencies they will require for advancement.
- “Continuity of leadership” is essential to drive organizations forward.

How can we be effective?

- There is no simple template for putting a succession planning process in place. Every organization is different, and each must develop a succession plan that fits its specific needs with management guiding the process.
- Many large organizations require succession planning applications or human resources information systems (HRIS) that provides visibility across the company. This is particularly crucial when talent can reside in many different locations.
- Succession planning is a complex task that requires constant attention and ongoing resources. Successful organizations devote considerable time and resources to mapping out skills and competencies so that they can hire and train appropriately and achieve a distinct competitive edge.
- A growing number of companies are recognising the value of succession planning, and they are expanding the concept from one traditionally used to manage only senior level positions to encompass managerial positions across the organization.

What are the benefits?

- A well-structured succession planning program will enable you to locate talent and prepare your organization for growth and ensure you have the right personnel to function at peak efficiency.
- Best practice organizations use succession planning to develop and maintain strong leadership and to ensure that they address all the skills and competencies required for today’s business environment.
- A smooth leadership transition from one generation of executives to the next can be achieved if succession planning is a top corporate priority.
- From recruiting the right candidate to developing new leadership from within, succession planning is essential for an organization to meet its strategic goals.

Program Review

The following is a brief overview of some key parts of the program to give an idea of how the application operates. It is by no means comprehensive but will, hopefully, illustrate the underlying intuitiveness and depth of Succession Wizard.

Succession Wizard offers the user the ability to make many choices relating to the information being stored and how it is displayed. These settings affect the whole of the program and feed through to many different screens and reports. The examples which follow utilize the Succession Wizard default settings which may be changed to reflect specific organizational requirements.

Fig. 1 shows the “Full Details” screen which is the core of Succession Wizard, allowing rapid access to all the information on each individual held on the database.

Fig. 1

Surname / Initials		Telephone
Abbot	E.	x77881

Preferred Name / Sex		E-Mail
Emma	Female	emma.abbot@hicksc

Date of Birth	Age	Grade
12/04/71	30	D

Job Title	Status
Analyst	Current

Division	Line Manager
Retail	Andrew Mansion

Department	Location
Brand Management	Sheldon House

Succeeded By	
Emergency	To
Ready Now	0
<2 Years	0
>2 Years	0

Emergency	Ready Now	<2 Years	>2 Years
Gordon Irwin			
Bernard Alexander			

The top half of the screen shows key personal information; much of which can be customized to reflect things relevant to individual organizations. For example, rather than seeing “Grade” and “Status” you may prefer to record “Location” and “Education”.

The bottom half of the screen shows a series of tabs holding further information on the individual. Clicking on the various tab heading brings that information to the front to view or edit. The various tabs are :-

Succeeded By - This holds the names of the people who could take over from the individual shown in the top half of the screen. A new successor is added by selecting their name from the appropriate drop-down
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box. As new successors are added, then the summary panel on the right in the top half of the screen is updated to reflect the number of potential successors within each category.

Job History - This is where the details of the various jobs undertaken by an individual are stored with details of the current role also shown in the upper half of the screen. Over time it will show an individuals complete career history.

Notes - This is where free text on a person may be recorded. All notes can be edited, added to, or deleted after they have been entered.

Assessments - This is a simple method of evaluating an individual. Score is a numeric value but is not limited in any way. For example, some users may use a scale of 1-5, whereas others may use percentages.

Attributes - This allows a maximum of 50 additional user-defined variables to be quantified. The sort of information measured can include the key managerial competencies relevant to an individual business.

Successor To - This shows those people for whom the individual in the top half of the screen could take over from. Information isn't input using this tab, instead it is populated as a consequence of what is added in the "Succeeded By" panel.

The ability to filter information held in Succession Wizard using the "Staff Search" screen allows users to quickly and simply identify people who satisfy certain criteria. This is particularly useful for identifying suitable candidates for roles.

Fig. 2

Attribute	Score
Adaptability	
Ambition	> 80
Change Management	
Coaching	
Creativity	
Delegation	
Leadership	> 75
Negotiation	> 75
Resilience / Energy	
Stress Management	

The drop-down boxes in Fig. 2 contain all of the values previously input making it very simple to specify filters and retrieve individuals satisfying any criteria. Inputting values into one, or more, boxes and then clicking the Find button will retrieve everybody who satisfies that filter and take you directly to their "Full Details" screen.

In the example shown in Fig 2 we have specified a filter where we want to find people who work in the "Corporate Office" division, have a grade of "C" and who also exceed specific minimum attribute values ie. They have an Ambition score of over 60 and Leadership and Negotiation scores of over 75. Clicking the Find button then takes us to the "Full Details" screen for people who satisfy this filter allowing us to review them individually.

Another key element of Succession Wizard is the ability to produce user defined reports. There are a number of report formats available covering all the different parts of the program from Job History, Notes and Assessments to the more central succession related issues. Fig. 3 is an example of a very useful report to show where succession issues exist; it shows the number of potential successors, by succession classification, on the left of the page. The right of the page shows the number of possible moves the same individual could be eligible for. Filters can be established, using a similar process to that illustrated in Fig.2, to limit the contents of a report with the ability to determine the sort order also available.

Fig. 3

Succeeded By				Name / Position	Job Start / Age	Successor To			
>2 Years	<2 Years	Ready Now	Emergency			Emergency	Ready Now	<2 Years	>2 Years
0	0	0	2	Emma Abbot Analyst	12/01/97 (30)	0	1	1	1
1	0	0	1	Bernard Alexander Development Manager	12/08/97 (35)	2	0	1	0
0	1	0	0	Tim Hughes Retail Accountant	12/12/99 (33)	2	0	1	1
0	0	1	1	Gordon Irwin Analyst	19/04/99 (28)	2	0	1	1
1	1	0	1	Sarah Lincoln Head of Strategic Development	07/12/99 (29)	1	1	0	0
1	2	0	1	Andrew Mansion Head of Retail Brands	04/04/00 (40)	0	0	0	1
0	0	0	1	Zoe Mantion Administrator	21/03/01 (25)	1	0	0	0
0	0	0	1	Tracey Ramsden Administrator	13/09/00 (22)	1	0	0	0
1	0	1	1	Alan Sawdean Director of Retail Finance	29/06/96 (48)	0	0	0	0

The report menu-bar in the top left hand corner gives the available reporting options ie, whether to print the report, edit the filter, sort the report into a different order for printing, export it to MS Word or MS Excel or close the report and return to the "Home Screen".

Frequently Asked Questions

What is Succession Wizard?

It is a software tool for planning staffing needs and identifying management succession issues within organizations. It allows users to find potential successors for roles which, if no successor was identified, could leave an organization exposed. Successors can be grouped into four user-defined classifications, with the default choices being :-

- **Emergency** – the successor can step in and take over the role as a temporary measure but not as a long-term solution or career progression.
- **Ready Now** – the successor has the skills to take over the role immediately.
- **<2 Years** – means the named successor should be ready within 2 years.
- **>2 Years** – possibly in a position to take on the role in more than 2 years.

Once information has been input then it is very easy to spot and resolve succession gaps, or identify suitable candidates for existing or new roles.

Who are the intended users of Succession Wizard?

The program has been designed for use by HR professionals and senior managers of organizations involved in succession planning. This means that any business with more than 50 people would benefit from implementing the solution. A growing number of HR consultants also use the software when working with client organizations.

Who currently uses Succession Wizard?

Typical customers are large businesses with in excess of 1,000 staff. Sectors covered are very wide and include, amongst others, banking, manufacturing, telecommunications, education, government, law enforcement and retail. The program is used in many countries with North America accounting for the largest proportion of users.

What is the difference between Lite and the other versions?

Succession Wizard Lite is the name given to the version used for evaluation and is identical to the full versions in all but two respects. Firstly, the number of entries which can be input is restricted, and secondly the data cannot be moved to a network location. If a customer decides to buy a copy then a password is supplied which converts the Lite version into a full version and allows additional entries to be made. It also, very importantly, allows the user to move the data to a network location allowing multiple users (assuming they each have an appropriate license) to access the same information for the purpose of inputting, filtering, reporting etc.

How much does Succession Wizard cost?

The cost of each copy is determined by the number of entries needing to be made, ie. the number of people required to be added to the system and is for each PC on which the program is installed. The versions and their respective prices in US dollars (net of any applicable taxes) are as follows :-

Junior	\$199	50 entries
Senior	\$399	100 entries
Executive	\$599	250 entries
Corporate	\$799	Unlimited entries
Enterprise	\$9,950	Unlimited entries installed on as many PC's as required.

If more than one license is purchased then each additional license is charged at 50% of the standard price. Each copy purchased comes with 90 days software support to answer any technical or implementation queries you might have. Once you have purchased Succession Wizard you will be quickly supplied with a password which will simply convert your Lite version of the program into whichever full version you have paid for. This means you can start succession planning immediately without needing to wait for software to be delivered.

Is it possible to have several users accessing information?

This is a standard requirement of users and simply requires that once a copy of the program has been purchased that the data is moved from the local "C" drive to a network location to allow others to share information. This feature is not available when evaluating the program using Succession Wizard Lite.

How secure is the information held on Succession Wizard?

Security is determined by the network infrastructure in place with a user. Data can be located anywhere the user requires and therefore only be accessed by those people who have been granted rights to that location by the network administrator.

What benefits are available with optional annual support?

We are continually looking at ways in which we can improve the program; often as a result of feedback from existing users. Annual support means that as well as having full technical support via email and telephone you also are able to benefit from all software upgrades during the period of support. The cost for annual support is \$99 for the first license and \$49.50 for each additional license.

I recently bought a copy of Succession Wizard Junior but I now need to input more people than the program is allowing. What can I do?

You will need to purchase an upgrade license to move to a version allowing additional entries for which you will be issued a new password.

Can we link Succession Wizard with our existing HR systems?

Information can be imported into Succession Wizard via a Microsoft Excel link. Therefore, any information held in existing HR systems which can be exported into a format readable by Microsoft Excel can be brought into Succession Wizard. There is also a similar feature to export information from Succession Wizard.

There are 4,000 people in our organization spread over 12 locations in 3 countries. Is Succession Wizard able to cope with these sorts of numbers?

Succession Wizard has been designed to cope with the largest of organizations and has been tested with 50,000 entries with no significant decline in performance. The ability to store the data in a network location means that users can access the information from anywhere that their corporate network reaches.

Are you able to customize the program specifically for my requirements?

We can undertake enhancements to tailor the program to an organizations precise needs. These vary from simple changes such as incorporating corporate logos onto screens and reports, to more major issues such as the integration with other programs.

Who developed Succession Wizard?

Succession Wizard was launched in early 2002 by Norchard Solutions Ltd who are a UK-based software

consultancy specialising in Management Information Systems for mainly corporate clients. Many bespoke applications have been written for a multitude of different business sectors in addition to a growing number of "off-the-shelf" packages of which Succession Wizard is one.

How can I access the user guide?

The Succession Wizard user guide can be viewed and if necessary printed out by clicking the **Start** button followed by **Programs** and then **User Guide**. The document is in PDF format, ie it has been designed and distributed using Adobe Acrobat. If you haven't got this program on your computer (you'll know this because if you try and access the guide without it, nothing will appear) then you will need to install the free Acrobat reader from the Succession Wizard CD. To do this proceed as follows :-

- 1) Insert the CD and at the same time hold down the Shift key on your keyboard, otherwise the Succession Wizard installation program will automatically restart (if it does don't worry simply click **Cancel** and then **Exit Setup**)
- 2) Click **Start**, then **Run** and then type in d:\acrobat followed by the **OK** button.
- 3) Click **Open**, then **OK**. A message now appears saying that Acrobat Reader is being unpacked. After this, follow the on-screen instructions to finish installing Acrobat Reader.
- 4) Once the installation has completed you may be prompted to restart your PC.

You will now be able to view and print the Succession Wizard user guide.

Do you offer any discounts for multiple licenses?

We have priced the product very competitively compared to other available software programs but do offer a discount if more than one license is purchased. Following the purchase of one license at the standard price all additional licenses are available at a discount of 50%.

How can we contact you?

If you have any problems with installing Succession Wizard, or would simply like to discuss a particular aspect of the program then you can contact us in various ways :-

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