

The Five Leadership Competencies: Secrets to Successful Leadership Succession

A White Paper

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Success is based on one's ability to see the future and act decisively upon it.

Whether your firm's transition to new leadership is five years, ten years or twenty years out, to succeed with leadership succession, every company needs to strengthen five major leadership competencies. This white paper lays the preliminary groundwork for the learning the skills that support leadership succession, as well as the development of key employees, high-potential employees, and the next-generation team.

Right now, more people are retiring from their own businesses than ever before. At the same time, the next generation of business owners — the thirty-five to forty-four year olds — is fifteen percent fewer in number than those they are replacing.

Scary? Yes and no. For owners who are retiring (or who want to retire), the situation is a challenging one, but one that holds surprisingly good potential for outcome. These advancing entrepreneurs — effectively managed — will be forty-four percent more profitable and fifty percent more productive. The Corporate Leadership Council surveyed eight thousand leaders who report that people management skill is the most important attribute of effective leaders. Well-managed talent also typically produces fifty percent more client loyalty.

Finding and keeping the right people to lead a company into the future frequently requires new skill sets. Management often overlooks staff with true entrepreneurial qualities and potential because young entrepreneurs do not always “play by the rules.” Using the Myers Briggs Temperament Instrument (MBTI), we are able to help key people identify natural entrepreneurial strengths.

Once identified, setting entrepreneurs on their success path will reap great benefits for the company. Doing so, however, involves an investment of time, energy, and resources. These energetic and ambitious individuals will need focused mentoring, training, and coaching. The long-term payoffs are critical and significant. These entrepreneurs will become fully committed to the business and will be the key players in the business' growth.

People, especially talented people, are any business' most expensive resource. They are

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your currency of trade and key competitive advantage. To retain identified entrepreneurs, technical leaders, and managers, owners must realize the need to actively work on company performance as well as to remove barriers to individual performance.

This requires an ongoing commitment to placing high potential talent in senior level positions within the company and giving them the opportunity — with support, authority, and responsibility — to succeed. By constantly filling the “leader pipeline” in this way, outgoing owners can help ensure their return on investment. Developing the Five Leadership Competencies skills will further help ensure a workplace environment that retains the best talent.

Effective management of talent means:

- Choosing the right individuals for your most critical roles
- Providing integrated interventions that support the succession of new leaders
- Developing pathways and empowering the next generation to be successful in those pathways
- Encouraging and rewarding high levels of performance

Identifying, retaining, and managing top talent is hard enough. But business owners — especially those who have built their companies from the ground up — often find that the most difficult task is delegating authority. The process of empowerment takes on a new dimension when an owner must trust that the next generation will care for the business as well as he or she has.

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Now that we have established the imperative, we are ready to dive into each of the five competencies. The majority of the material for this white paper comes from our field-tested, battle-ready workshop *The Failsafe Exit Strategy* and from *Stepping Stones* — a toolkit that includes strategic planning overviews, goal plan forms, vision statements, market sector research guidelines, and effectiveness tools. These best practices have proven successful in hundreds of firms nationwide. Additional material comes from *Mastering the Rockefeller Habits*.

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The five leadership competencies are:

1. Conducting difficult conversations — Breakdowns in communication will inevitably occur during the process of leadership succession. Learning how to address them quickly and directly by utilizing a model for effective conflict resolution is critical. If swept under the rug, the lump of issues will continue to grow larger and larger until people start tripping over them.
2. Letting go — At the heart of letting go is the ability to delegate and share authority. Without delegation skills there is a hesitation — even paralysis — for owners who are not clear about who will do what, how they will do it, how fast they will do it, and exact expectations. This hesitation is normal and natural; there are effective ways to get beyond it.
3. Coaching and mentoring — Learning to coach and develop your direct reports has everything to do with your success and that of your key personnel. To do so you must focus on the important and not just the urgent. Delegating work requires the complementary skill of coaching your understudies. To delegate is to accept the responsibility to coach performance. Coaching involves teaching and taking a stand for the delegate's success. Learn to enjoy the process of advancing the career and development of your reports. As you do so, you will also advance your own career.
4. Strategic Planning — There are four critical decisions every business must get right in order to succeed — People, Strategy, Execution and Cash. There is also a definitive set of three fundamental habits that make it easier to manage your business. In addition, there are two drivers and one essential tool, which align everyone and get them on the same page. This highly acclaimed, proven 4-3-2-1 business framework produces the strategic direction and results every organization seeks.
5. Developing a cohesive vision for the future — Successful succession means key people and high-potential employees own the company with their hearts and minds before ever being asked to own it with their wallets. To start the process, begin by inviting up-and-comers into the company's strategic planning process.

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Conducting Difficult Conversations—The First Leadership Competency

We've all had to face challenging issues and have had to conduct difficult conversations. Most, if not all of us, have tried to avoid confronting a coworker, peer, or subordinate. Avoidance seldom works out. In fact, the problem only gets bigger and unwieldy for everyone involved.

When it comes to succession planning it is crucial to face some hard truths. So, what are some of those difficult conversations that are typical in the move from the first to the second generation?

Imagine the current stockholders as the hub of a wheel. The entire company has revolved around this particular owner or a set of owners. As high potential talent matures, they start to look at each other, noticing for the first time what kind of decision-making, people skills, and judgment the other people around the table have. They might ask, "How do I feel about being a future partner with these people?" Answering this question might prove to be a difficult conversation.

These new leaders must be able to conduct all sorts of difficult conversations about their roles in working together, their responsibilities, and the expectations they have of each other. Next generation leaders also need to be able to make controversial business decisions at times to help ensure the health of the company.

Many techniques are available to improve skills in this area. One highly recommended method is the creation of a study group with key employees using the book, *Crucial Conversations*[®].

This material can be used in both your personal and professional life. It teaches you how to:

- ⊙ Stay focused on your goals even when emotions run strong;
- Increase awareness of warning signs that a conversation is about to take a turn for the worse;
- Make it safe to talk about almost anything;
- Create healthy dialogue even when you feel scared, angry, frustrated or hurt;
- Say potentially hurtful things in a way that minimizes defensiveness;

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- Listen effectively even when others blow up or clam up;
- Move successfully from discussing tough issues to taking healthy action.

We've facilitated Crucial Conversations workshops as authorized instructors to our clients over the years. Many have stated that it is the single most powerful and effective thing they have ever done for their company. It is an essential tool.

Once you have mastered how to conduct difficult conversations and learn to use it effectively with the other four competencies it is a proven, powerful process for aiding transition.

Letting Go—The Second Leadership Competency

Now it's on to Letting Go. We know, two simple words, but very hard to implement. To successfully transfer power, a company must identify expectations, goals, roles, responsibilities, and know how to hold others accountable. Everyone must improve his or her delegation skills. In addition, owners must communicate who has authority and behavior must be consistent with that message. The people impacted by these changes must understand the process for accessing information and decisions.

Empowerment is crucial at the team and organizational level. Owners must make a commitment to include key and high-potential people in the discussion of organizational barriers to improved performance and change. These individuals must be invited to planning sessions where they can contribute to the future vision of the company. When owners open the door for high-potential people to own a piece of the future of the company with their imaginations, talent, and heart, they demonstrate to the entire company that opportunity exists. Once a company has made this leap, it must back it up with communication about these new roles as well as conferring the authority to go with the new responsibility.

High-potential employees need opportunities to take on strategic learning projects that will improve their performance and their confidence. By choosing opportunities that will improve the company's bottom line, owners create a winning situation for themselves and the high-potential people. The strategic learning project teaches business acumen, and the accomplishment increases the confidence of the owner of succession success.

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High-potential people need to learn how to empower their teams to step up with them. As individuals in a company rise to meet new opportunities, they must delegate more effectively to the people behind them, letting go of some of their duties and providing new opportunities for others.

To key employees, this process is analogous to walking through an open door. Imagine that an owner has built a doorway to the future and feels that he has invited the key and high-potential people through that doorway. The owner is standing on the other side, inviting the next generation to walk through that doorway and meet him.

Remember, the owner himself was a self-starter and entrepreneur; that is what he did to start the company. But the next generation is within the owner's company, and that generation's experience and qualities will be different from the owner's.

Notice that the doorway discussed above, built by the owner, looks very different to the people on the other side. The key people and the high-potential employees are on the other side of the doorway, and some of them are saying, "What doorway? When did you build a doorway?" Others are saying, "Why did you lock the door?" Still others are saying, "I see the doorway. I see the way through the doorway, but there's a jungle on the other side. Are you going to give me a machete so I can create my own pathway in the jungle?"

To combat the many types of perceptions, the owner must make sure that each person first sees the doorway. Then each person must have the experience of the open doorway, accomplished by empowerment, handing each one the tools they will need (the machete — skills, experience, training and mentoring) as he or she goes through the door. Then employees can get through that jungle on the other side, and create their own pathways into the future.

The hesitation process also has to do with trust. An owner, to let go, must trust that the next generation will care for the business and the company the way he has. The next generation must learn to behave as the safety net, allowing nothing to fall through. The owner has spent a lifetime building the reputation of the company and does not want to risk its reputation in any way.

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The key people's hesitation is based on the concern that the owner will not want to let go. They fear the owner will say he'll let go, but really won't. This letting go and empowerment requires skill to do effectively. The good news is these skills can be learned.

What often happens is that an owner hands a challenge such as a new role to the employee and says, "Here's a boulder, go swim across that river." In that way, the owner tends to ensure failure, rather than to build confidence. What you want to do instead is hand the key people medium-sized rocks, such as a strategic learning assignment like improving a standard operating procedure. This type of a project is more like asking a person to carry a rock through a stream. There is always time for the boulder and the river, such as a new and challenging role, once an individual has gained experience and confidence.

Coaching and Mentoring—The Third Leadership Competency

Before we go into coaching and mentoring let's briefly cover the important distinctions of leading, managing and coaching. Leading is about the future. It's about vision and inspiration. It requires a natural inclination to thinking and to promoting your ideas with influence. Management is more about productivity, how to keep doing what you're doing well. It's about the results, and making the future real. It requires the natural inclination to study structure and analyze information.

Coaching involves focusing the thrill of commitment and the desire to help another person succeed. It requires a learning, teaching, and developmental mindset. As you and the person that you're coaching get started on a coaching relationship, there are a few things to consider. Not every coach is going to be the best coach for each individual, there has to be mutual selection. One way to do this is to introduce a number of coaches to a particular set of high potential people, and let them select their own coach. Coaches may be internal or external. Different coaches will offer different skills and strengths. With a variety of coaches, you may have someone who is better at management activities. You may have someone who's better at big picture planning. You may have someone else who is better at general breakthrough performance coaching. This way, those various coaching methodologies are available to the person and will allow you to find a style and individuals who work well together.

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Your first month may be a pilot, meaning that it is a test situation to see if you're right for each other. The first thing that you want to do is establish your time for an interview and your discussion about the coachee, that's the person being coached. You will want to discuss the coachee's action plan, what they want to achieve, and why. You'll need to determine their barriers and choose a few from the list (not everything) to start with. You'll need to review confidentiality, learning styles and commitment. Confer that there will be homework assignments and work through any concerns of the coach or the coachee during the process. Gain commitment from both parties to meet each week or each month as appropriate. Establish how often you'll meet and for how long. An hour is a good length of time for each session.

A great way to begin coaching sessions is to ask for observations and mentoring that the coachee shares about what they've achieved since the last time you've met. At the end of each session, ask "what do we need from each other to continue to have a great relationship with the coaching experience?" The absolute most important skill for coaching is listening. Our brains have a natural storytelling inclination, which means we often tend to listen to what's going on inside of our head as much as we're listening to what's going on outside. The coach and the coachee must ensure they are listening and not drifting away.

It's important to observe patterns of behavior. Coaches are outside observers. They can help a coachee understand ineffective behaviors they are unaware of and are repeating, over and over again. A good coach will help the coachee explore the beliefs behind their pattern. Why do they behave that way and explore how a behavior impacts others. If a coachee doesn't know how their behavior impacts others, that's a great opportunity for coaching conversation. How else are they going to improve?

Again, be certain to discuss expectations. What are the ground rules for your conversations? It's essential to make and keep appointments for important conversations. One thing that the coach and the coachee should agree on is how to set appointments — with each other, with team members and with clients.

Let's say that you're coaching someone about how to build his or her sales pipeline. Get them to talk with you about how they currently make business contacts. How do they build their network? How does the coachee succeed right now in building business with current clients? The next step is to identify the gap between where they are now

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and where they would like to be. Now remember, as the coach, you are going to find ample opportunity to give them positive feedback about the things they're doing right. This builds their confidence and trust in the relationship. Then you're going to feed forward, perhaps making several suggestions about what they could do to improve their business development skills. Next, you're going to make a contract. What is the commitment or the action that the person will engage in over the next week to continue to improve their business development skills? Then you can start your next conversation with checking in. How did they do with their last commitment? It's vital to make specific commitments and to follow through on them.

Finally as you discuss the gap between behaviors, find out if there is a commitment to change. How deep is that commitment? Is it a light commitment, like "I think I want to do this," or is it an absolute commitment, like "I'll do whatever it takes to learn these skills?" You need to know that, and you want to coach your coachee on activities where they have an absolute commitment. It is not worth your time to coach a passive commitment.

As part of our Failsafe Exit Strategy program we go deeply into all aspects of coaching, professional development planning and mentoring, including listening skills, feedback mechanisms, accountability, performance measures, behavioral correction plans, and how to inspire breakthrough performance from your team members.

Strategic Planning—the Fourth Leadership Competency

Earlier we mentioned the 4-3-2-1 business framework, which provides any organization a strong foundation for success. This is the basis of an executive workshop we conduct, Mastering the Rockefeller Habits, a program delivered to over 22,000 senior executives of the world's best run firms.

Let's go into more detail on the four critical decisions every business must get right in order to succeed.

1. People—hiring and retaining the right people makes the difference between ulcers and headaches or a company one looks forward to leading. That's easier said than done in most businesses. But usually it's a lack of emphasis (rather than

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actually being difficult) on getting, keeping and growing the right people that creates the ulcers and headaches.

The first question is now a business classic first introduced by researcher and bestselling business author, Jim Collins: “Do you have the right people in the right seats on the bus?” That’s an important question to ask. Put another way, when evaluating the individual talent in your organization, ask yourself “would you hire that person again?” If the answer is no then you definitely have the wrong person sitting in the wrong seat—and you need to take action.

Once you have the right people in the right seats you need to determine if they are doing the right things. Are people wearing too many hats, performing too many job functions resulting in a diluted effort? Or, are two people or more in charge of the same job function? If so, who is really accountable? Worst of all, is a major role like marketing or customer service unattended?

Fortunately, there’s an easy-to-use tool called the Organizational Accountability worksheet (contact us for more info). This all-important worksheet allows you to quickly:

- ⊙ Name the #1 person accountable for each role or key position
- ⊙ List key measures for each position
- ⊙ Take your profit/loss and balance sheet and assign line items to the person
- ⊙ Measure monthly whether any item is on plan or off so you can make appropriate adjustments

Using this methodology is a real eye opener. Most senior executives are floored at the gaps and experience a true “Aha!” moment when they see key functions that have too many people, no one assigned, or the wrong person in the role.

Get this part right and your life will be a lot easier—and you’ll be a lot happier!

2. Strategy—can you state your strategy in a clear, concise manner? Can your senior team? Having the right strategy has a huge impact on your business because it affects two things: revenue and growth.

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So, where do we start? There are many components that go into a comprehensive strategy that affords you the ability to synthesize it down and communicate it clearly.

- ⊙ Your Core Ideology—the core values and purpose of your organization supported by a handful of rules
- ⊙ Your Brand Promise—the pact or promise you make to your customers supported by the systems to deliver on the promise. This is also called the reason-to-believe or unique selling proposition (USP)
- ⊙ Big Hairy Audacious Goal (BHAG)—your 10-25 year outrageous goal for the firm
- ⊙ Your X-Factor—the bottleneck in your industry that, once solved, will give you a 10x competitive advantage
- ⊙ 3-5 Year Thrusts and Objectives
- ⊙ SWOT Analysis—Strengths, Weaknesses, Obstacles and Threats
- ⊙ One-year Strategic Plan—with clear roles, responsibilities and who is accountability at departmental and individual levels
- ⊙ Quarterly plan—what are the top 5 and top One of 5 activities that you will work on this month, this quarter to drive to your strategy

Of course, a proper strategy cannot be developed unless you know your target audience, your sandbox and your competition. If it sounds complicated, it isn't. Guided methodically through a proven strategic planning process with actionable, practical tools your senior team can develop a solid business strategy that will drive revenue and growth for years to come.

The best tool we've seen to develop a clear, coherent strategy is the Gazelles' One-Page Strategic Plan. This worldwide standard puts in one easy-to-find, easy-to-update and easy-to-communicate place the strategic essentials for your organization.

A final word, an effective strategic plan is not a static document that gets worked on once a year and then stuffed into a drawer. Rather it should be a dynamic, living, work-in-progress tool that directs your company toward its goals.

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3. Execution—this is where companies save time. And these days, with a seemingly endless stream of crises du jour, we all need more time. The challenge is how to blend an entrepreneurial culture with a disciplined culture without killing either one. If you want to reduce the time it takes to manage your company get good at these disciplines.

Companies that wish to succeed in this phase of the economy must blend discipline into their culture. Below is an abridged version of the proven Rockefeller Habits checklist that you can use to determine if your firm has the discipline to succeed.

Don't worry if you don't check off all the items — or even if you don't know what all the items mean — it is meant to give you a snapshot of how well you are doing compared to other well-run firms who have adapted these crucial best practices.

- ❖ Everyone is aligned with the #1 thing that needs to be accomplished this quarter to move company forward
 - ❖ Communication rhythm is established. Information moves through organization accurately and quickly
 - ❖ Every facet of the organization has a person assigned with accountability for ensuring goals are met
 - ❖ Ongoing employee feedback and input is systematized to remove obstacles and identify opportunities
 - ❖ Reporting and analysis of Customer Feedback data is as frequent and accurate as financial data
 - ❖ Core ideologies are "alive" in the organization
 - ❖ Clear understanding of the firm's market position drives strategic planning and sales and marketing
 - ❖ All employees can report at any time what their productivity is and how it compares against goals
 - ❖ A "situation room" is established for the weekly executive team meeting
 - ❖ As goes the Executive Team goes the rest of the firm
4. Cash—a company can survive a long time without profit but it cannot survive a day without cash. It is the lifeblood of any firm. It's simple really. Without cash

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you're out of business. Cash is the oxygen of every organization. And in these trying economic times cash is even becoming harder to come by. Having good cash flow or viable access to a line of credit is essential to your firm's survival. Cash affords you options so you can make decisions that can improve your company's position and growth.

One powerful, proven tool you can use to identify sources and increase your cash is called the Cash Conversion Cycle. There are 4 components to the Cash Conversion Cycle:

1. Sales
2. Delivery
3. Billing & Payment
4. Make/Production & Inventory

All four of these areas are important when thinking of ways to improve your cash position.

There are also three crucial areas to consider as you look at the four components above. Think about how to...

1. Shorten the cycle time
2. Reduce mistakes
3. Improve your business model

It sounds more daunting than it is. As an example, by taking a look at your billing practices you might discover that you could change quarterly support agreements to annual, thereby receiving a full year of support revenue in advance, which shortens the cycle time and increases cash. Or, you could improve your sales cycle through more effective proposals and a more proactive approach to closing deals. Or, you might realize a way to reduce your delivery time from 30 to 10 days simply by reviewing internal processes that have gotten out of hand over time. The point is, there are a number of ways that you can improve your Cash Conversion Cycle. And that can have a real impact on your bottom line.

Getting these four critical decisions right is essential even in prosperous times. It is even more imperative in these trying times. As important is getting them into

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an annual and quarterly strategic plan that aligns everyone, communicates it, and keeps people on the same page.

For the purposes of this white paper and in the interest of brevity, we will briefly touch on the three fundamental habits, two drivers and one essential tool of the 4-3-2-1 business framework.

Three Fundamental Habits:

- ⦿ Priorities—the 5 priorities and one top priority for the month, quarter and year
- ⦿ Data—the right data on daily and weekly basis for proper insight
- ⦿ Rhythm—running well-organized daily, weekly, monthly, quarterly and annual meetings to ensure everyone is aligned and accountable

Two Drivers, which outline and fuel the company's perception and output:

- ⦿ Reputation—based on relationships with your people, customers and shareholders
- ⦿ Productivity—based on transactions and activities in the making, selling and bookkeeping of the business

One Page Strategic Plan, an essential tool discussed above, which is the working document that results from the previous three parts of the framework. The one-page strategic plan aligns everyone, communicates it, and keeps them on the same page.

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Developing a Cohesive Vision for the Future—the Fifth Leadership Competency

What is the power of an understood and inspiring vision of the company's future, and what happens without it?

The same question can be asked of the next-generation team: What happens if they do not have a unified, understood, and inspiring vision? How do they step into leadership without it?

The power of the owner's vision is cohesion and alignment, and once everybody sees the same picture, it is amazing how quickly visions come to fruition.

In one case, the last founding partner in a company was transitioning out, with seven new incoming stockholders. In retreats and strategic planning sessions, they identified a goal to reach twenty percent profitability for the first time in the history of the company (previously, profitability had not been a focus of the company). For one year, the next-generation team met every month to look at their financials. That year, the company met its profit target goal for the first time.

Why did that happen? Because the company created a vision, structured a process and worked it.

By setting the goal of becoming a profitable company, they committed to attain industry level profitability. They still loved their craft and now focused on loving the business as well.

These same individuals came away from the retreat with a newly named managing partner and a new chief financial officer. Together with the marketing/human resources partner, they formed the new executive team. Because the team was able to significantly increase the profitability of the company (which also helped fund the ownership buyout), and had taken on the day-to-day management of the company, it became easy for the founding partner to reduce his work to halftime and begin the career-culminating work he had envisioned for himself.

Another company created the vision to move from renovating hospital suites to

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building hospital campuses and assisted-living centers. Once they stated that objective, within eighteen months the company grew from seventeen people with four principals to fifty people. They were soon building large hospital campuses and assisted-living centers all over the country.

You can empower the next generation to be part of this. Owners find that once they step out of the way, their companies grow and develop and flourish while they reduce the amount of effort they put into it. Owners also find new life in achieving new goals and career-culminating dreams.

Another benefit of the visioning process is the impact on the company and the growing confidence of staff. The opportunities for next-generation leadership become apparent. They can start to name the initiatives they want to lead. Succession planning is a time of defining a game that is worth playing, and to bring purpose and fun to work.

How do you prepare for a vision session? First of all, study methods of strategic planning before you have a retreat. Generally a visioning session is going to be in a retreat, in a place where your surroundings include windows and you're not inside under fluorescent lights. Select a place where there's a nice atmosphere around you. If you're only going to do one day, I like people to start at noon on one day and end at noon on the next because sleeping overnight on your thoughts and having time to talk about things and having the informal time at night is important to the process. You need to consider all the various ways that you interact.

The most important thing to do when you're planning a visioning session — or any type of retreat planning, client or a project meeting — is always ask what the projected outcome is that you want to achieve. If you don't know that answer going into your session, you're likely not to achieve it. Focus your efforts on the end result beforehand. If people come in with their minds seeded with ideas already germinating they're going to do much better.

The CEO or president must take a leadership role but must also engage and involve senior executives and high potential people in defining, articulating and driving vision and change. The harder part is living the vision story, every time you have an opportunity talk about it. Create a sense of and use personal examples. "We're going from here to there and when I've had a challenge like this in the past, this is how I've

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dealt with it and this is what I learned." That shows vulnerability, and it also shows that you've been willing to stretch yourself.

Remember, when it comes to people it almost always about "what's in it for me?" That's why you and your senior executives and managers must cascade your storyline all the way down the line to your project managers, interns and job captains. They all need to say the same things. Everyone has to be part of that storyline, so selling the storyline is important. To be sure, it's a big job. While cascading the story throughout the organization, you also need to find your thought leaders and influencers. There are informal leaders in your company; people that everybody listens to around the water cooler, at lunch, at happy hour or wherever it is. These people need to be ambassadors of your vision, because they're going to carry the message sometimes more effectively than the rest of your team.

As you complete your visioning session, remember to create talking points. Everyone should know the two or three things that happened in this meeting so they can articulate it to others. But it doesn't stop there. You must follow up and follow through. You have to continuously convey your message — and your progress toward accomplishing the vision — throughout the firm. That is the responsibility of leadership.

Summary

So there you have it, *The Five Leadership Competencies: Secrets to Successful Leadership Succession*. Again, it doesn't matter whether your firm's transition to new leadership is five years, ten years or twenty years out, to succeed with leadership succession, every company needs to strengthen these five major leadership competencies.

1. Conducting difficult conversations
2. Letting go
3. Coaching and mentoring
4. Strategic Planning
5. Developing a cohesive vision for the future

This white paper only scratches the surface of the myriad considerations and complexities of succession planning. But it does layout the basic learning skills required to develop key employees, high-potential employees, and the next-generation team.

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We are available to assist you in your succession planning transition. We offer a robust array of workshops, webinars, seminars, audio CDs, books and resources as well as consulting and coaching, including:

- ❖ Define and Leverage Your Personal Leadership Style
- ❖ Failsafe Exit Strategy™
- ❖ The Leadership Mindset™
- ❖ Stepping Stones: 5 Essential Steps for Transition Success
- ❖ The Fine Art of Delegation: Tangible Skills for Leadership Growth & Sanity
- ❖ Mastering the Rockefeller Habits executive workshop
- ❖ Crucial Conversations™

In addition, we offer a number of valuable free resources on our website at www.sandyblahaperformanceconsulting.com.

About Us

Sandy Blaha, president of Denver-based Sandy Blaha Performance Consulting, is an Exit Planning company that increases the wealth and success of owners, individuals, teams and companies engaged in legacy ownership and leadership transition projects. We focus on strategy, organizational structure, leader development, capacity building, executive and team coaching, execution discipline and on maximizing your return on your investment.

Sandy has worked with owners and senior executives nationwide to help them leverage their roles to their highest and best uses, develop effective management teams, and to develop exit strategies, plan for retirement, and insure their companies' legacies using effective delegation. We also work with high potential personnel to fully develop their capabilities and align their strengths with the company's direction and key measures of performance.

Sandy is also an accomplished and highly sought after speaker, including frequent presentations at industry conferences such as the American Council of Engineering

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Companies and the American Institute of Architects, on a number of essential business topics important to the industry.

Sandy holds a Bachelor of Science degree in education from Ohio University, and a Master of Arts degree in communication and leadership from the University of Northern Colorado. She is the author of *Passing the Torch: A Toolkit for Leadership Development and Transition*, *Stepping Stones: 5 Essential Steps for Transition Success*, *Exit Planning: The Leadership Succession Challenge* and *The Leadership Mindset™*.

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