



Leadership x2

Effective Strategies for Capacity
Building and Succession Planning

Presented by
Joe Frodsham





Are **YOU** **preparing** successors or
just **protecting** your position?



Would **YOUR** organization **thrive**—or
pause—if you stepped away tomorrow?



COMPAQ

Introduction



Joe Frodsham
President

CMP AT A **GLANCE**



CMP is a global talent and transition firm providing innovative talent solutions since 1999.

Talent Acquisition

We take the guesswork out of hiring

Through high-definition recruiting and predictive and efficient assessment.

Talent Development

We build capability and performance

Through deep assessment, coaching and consulting expertise.

Career Transition

We change careers and lives

Through high value outplacement and career transition solutions.



CMP is a minority & woman-owned firm



SBA WOSB
Woman Owned Small Business



A Sample of Who We Serve

Trusted by industry leaders, we partner with globally recognized brands



Our Commitment to Inclusion

We Empower Through Advocacy, Insights & Innovation



Diverse Lens . Unique Results



Diverse Leaders – American Narratives Podcast is dedicated to building a more inclusive, equitable and diverse society through story telling.

www.AmericanNarratives.com



Deeper Insights – Recognized leader on assessment and development of minority talent.

www.LatinoCareerAssessment.com

As seen in

Forbes

Thought Leadership – Published authority on coaching and developing for Diversity, Equality & Inclusion

Recent Articles

- Layoffs Adversely Impact Minorities and Minority Communities
- Transformational Coaching: 6 Ways to Facilitate Difficult Change
- Addressing The Latino Career Chasm Through Allyship And Development
- Coaching for Sustained Change: Leading Diversity, Equity and Inclusion
- Narrowing the Latino Career Chasm With Culturally Relevant Coaching
- Helping Clients Realize Sustainable Change Through Targeted Coaching



Agenda

Strategies for Capacity Building and Succession Planning

State of Succession

Results of CMP 2025 C-Suite National Pulse Check

Complimentary Leadership

Beyond the “Hero Leader” to the synergy, necessity, and power of 2

Defining Capabilities

- Identify potential – 4C Leader Success Profile
- Leading forward – market-driven leadership competencies

Developing Leaders

- Development planning – 70/20/10
- Experiential learning – characteristics of crucible positions

Enterprise Tools

- Succession Pools
- Performance and potential – 9 Box



State of Leadership & Succession

209 C-Suite Nonprofit Leaders
2025

CMP

2025 National Pulse Check Report
Nonprofit: C-Suite Insights



Governance & Succession

What is the level of maturity of your top executive (CEO) succession?



There is a clear and ready internal successor.



There is at least one internal successor who could be ready



There is no internal successor who could be ready



Governance & Succession

How is your organization addressing leadership succession and talent retention?





Governance & Succession

What are the most critical competencies that your leadership team needs to develop in 2025?



Additional competencies:

- Navigating ambiguity
- Stakeholder management
- Vision casting
- Initiating crucial conversations
- Influence
- Inclusive behavior
- Diversity sensitivity

Key Takeaway

Succession planning must move higher on the agenda. Organizations that proactively build leadership pipelines and align boards with mission and community will be more resilient in transition.

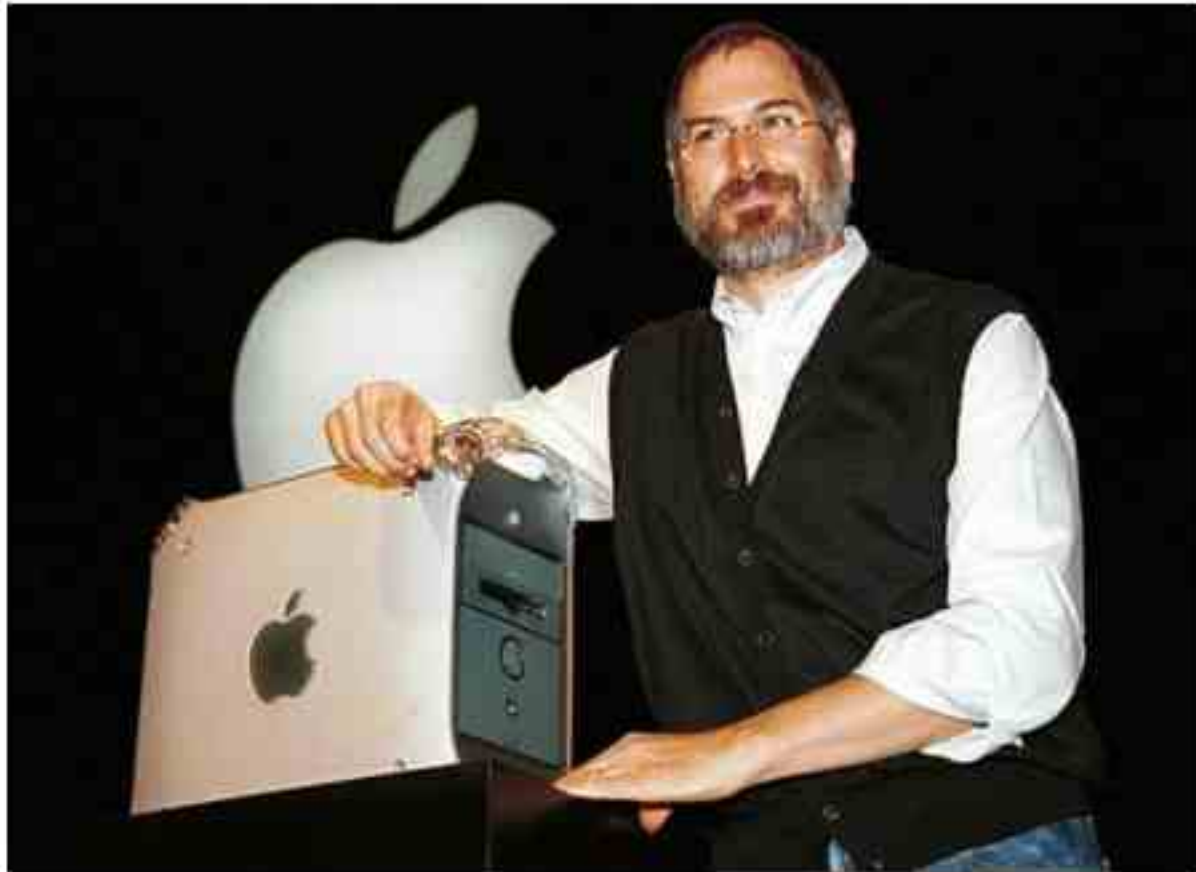


Complimentary Leadership

Often the missing piece

1 Great Leader Model

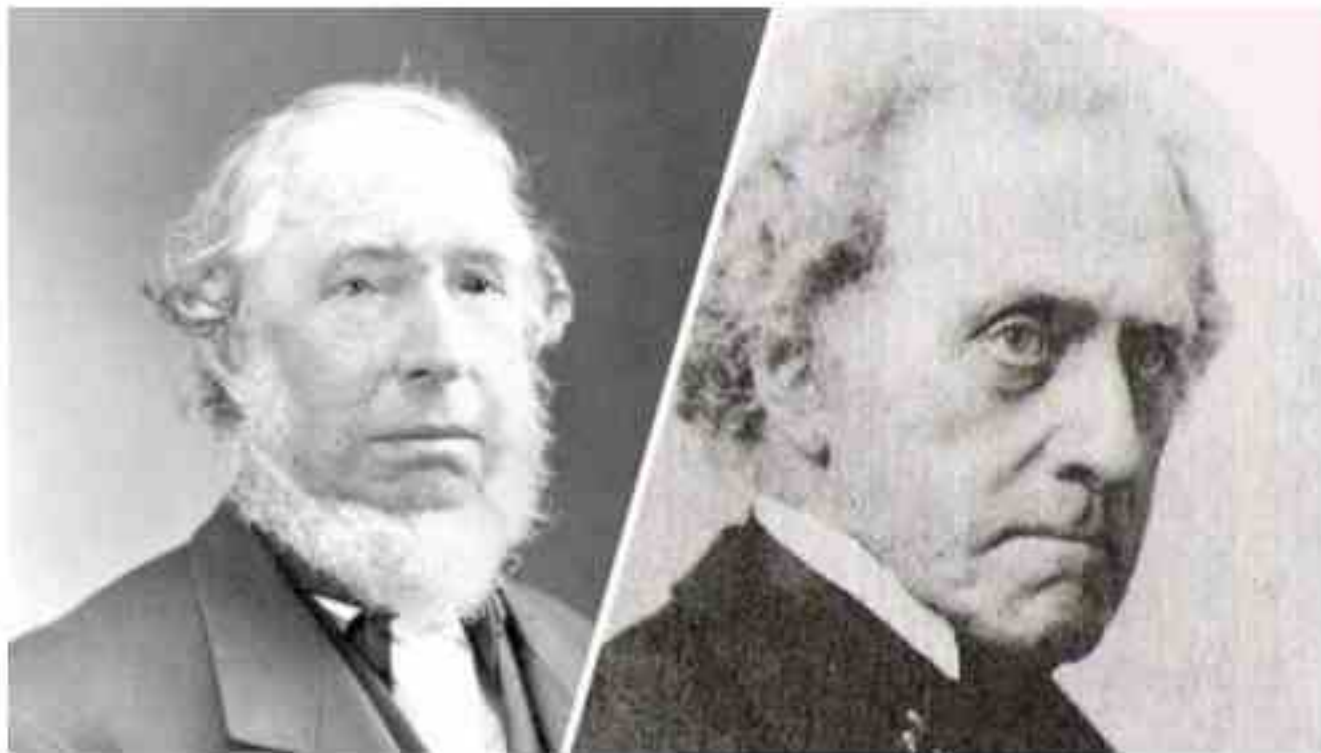
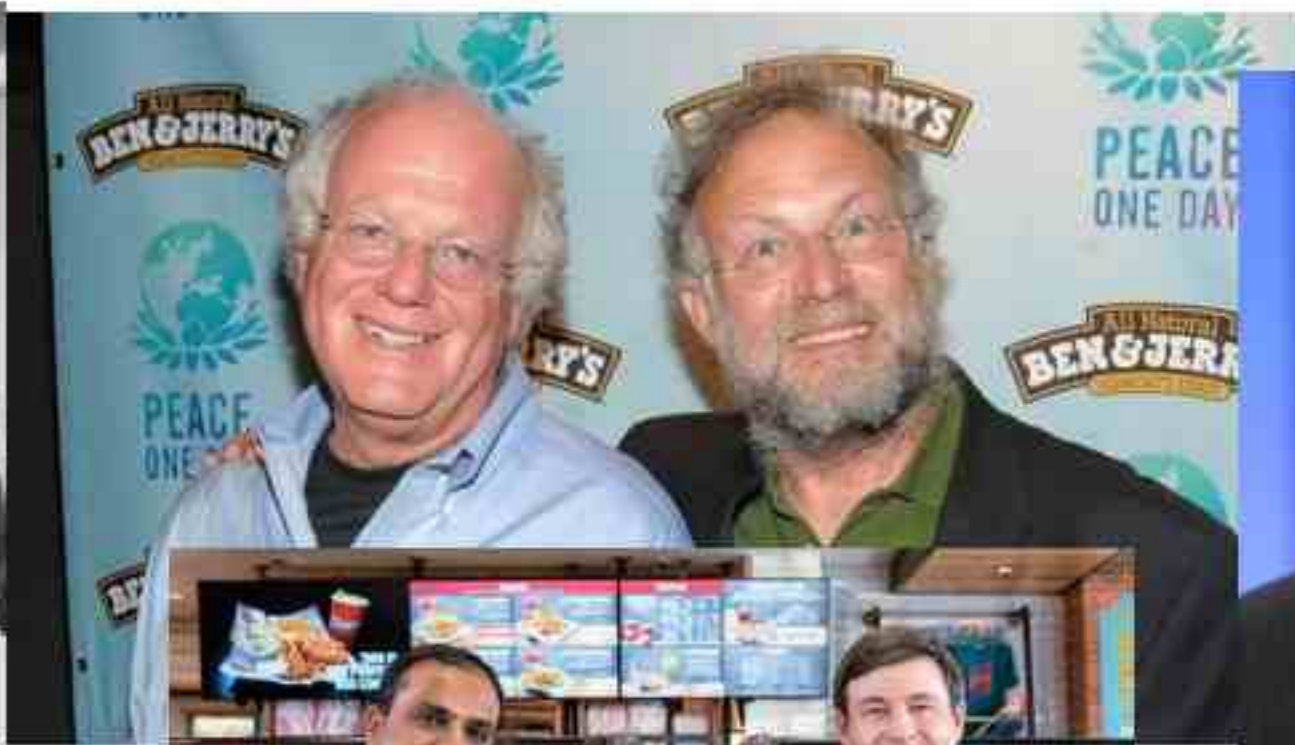
Most leadership development and succession management is focused on identifying the one capable leader.



Yin and Yang



- › Two complementary and opposing forces which make up all aspects of life.
- › These forces are in constant flux and balance each other.





Two halves make a leadership whole . . .

- › Different skills and perspectives – but aligned.
- › Realize synergy through difference, connection, trust and transparency.

Strategy/Innovation - Operations

Task - People

Data - Experience

Head - Heart

Linear - Wholistic



Bernie Taupin & Elton John



Gerry Goffin & Carole King



John McCartney & John Lennon

Creating by 2's



Maryanne Piña
CEO



Joe Frodsham
President



Strategy/Operations
People
Experience
Heart
Linear



ISFJ

- Education Leadership
- Spanish speaking border town
- Methodical and operations focused



ENTP

Innovation
Task
Data
Head
Wholistic

- Organization leadership – different industries
- Canadian – English/French
- Impetuous, impatient, “next” focused

Together = 5x Growth, national Latino Career Advancement Launch, new markets . . .



Key Learning

Greater difference creates more opportunity for abrasion, however . . .
on the other side is complementary leadership and true synergy



Success Elements

Aligned vision and values

Co-leaders must have a shared vision and be committed to the same core values to guide their decisions.

Complementary roles

Dynamic areas of responsibility for each leader is crucial for synergy and alignment across the organization.

Regular communication

Consistent and candid meetings for the co-leaders are essential for discussing issues and maintaining alignment.

Mutual trust and respect

A high degree of trust, open communication, and respect for each other's contributions is paramount for the partnership to thrive.



Benefits

- ✓ Increased innovation/creativity
- ✓ Reduced burnout & shared load
- ✓ Broader diversity in leadership
- ✓ Better decision-making
- ✓ Built-in succession & continuity
- ✓ Mitigation of leader isolation



“Man stands in his own shadow and wonders why it’s dark”

Zen saying

What do you need to round yourself out?



Your Complement

Strategy/Innovation - Operations

Task - People

Data - Experience

Head - Heart

Linear - Wholistic

Other: _____ - _____

Ask Yourself . . .

What unique strengths do I bring?

-
-
-
-
-
-

What gaps need support?

-
-
-
-
-
-

Succession Planning & Leadership Development

Key Practices to Identify & Develop Future Leaders



Purpose: Provide a framework for developing your future leaders

Defining Capabilities

- **Identify potential – 4C Leader Success Profile**
- **Leading forward – market-driven leadership competencies**

Defining Capabilities

Identify Leadership Potential

Software

Capabilities that can be developed – the area of focus to maximize performance and potential.

Hardware

Attributes and predispositions that are largely ingrained. It is our personal “wiring” and is difficult to change.

Defining Capabilities

4C LEADERSHIP PROFILE

SOFTWARE



COMMUNICATION

ENGAGES ALL
CONSTITUENTS



COMPETENCY

APPLIES STRATEGIC
& FUNCTIONAL
SKILLS

HARDWARE



CHARACTER

TRUSTWORTHY
& MATURE



CAPACITY

APPLIES THOUGHT
LEADERSHIP

Predicting Fit and Potential

A Universal Model



Defining Capabilities

Software

Communication

Engages All Key Constituents

- ☐ Proactively builds relationships with all key constituents
- ☐ Energizes and inspires greater effort
- ☐ Articulates messages clearly and concisely
- ☐ Actively listens and responds effectively
- ☐ Appropriately conveys compassion and sensitivity
- ☐ Is an effective ambassador for the company
- ☐ Is accessible
- ☐ Is credible

Competence

Applies Strategic and Leadership Skills

- ☐ Achieves strong results across all areas of the strategy
- ☐ Understands market dynamics and opportunities
- ☐ Exhibits sound financial discipline
- ☐ Delegates effectively
- ☐ Coaches and develops people
- ☐ Builds strong teams
- ☐ Recognizes and encourages innovative solutions
- ☐ Effectively initiates and manages necessary change
- ☐ Responds effectively to unanticipated change
- ☐ Expects and supports high levels of performance

Hardware

Character

Is Trustworthy and Mature

- ☐ Takes personal accountability - owns failures and shares successes
- ☐ Overcomes obstacles and persists to get the job done.
- ☐ Delivers on commitments
- ☐ Has integrity - lives the values they espouse
- ☐ Leads in a fair and supportive manner
- ☐ Recognizes and effectively deals with poor performance
- ☐ Encourages and responds well to feedback
- ☐ Puts the needs of the Company above their own
- ☐ Is a stable influence

Capacity

Applies Thought Leadership

- ☐ Identifies and manages the few core issues amongst multiple data and inputs
- ☐ Provides greater insight and thought leadership to a group
- ☐ Views situations from various perspectives resulting in more effective solutions
- ☐ Sees patterns and opportunities
- ☐ Is self aware, knows their strengths and development needs
- ☐ Effectively manages complex problems and opportunities
- ☐ Is adaptable - open to learning and doing things differently
- ☐ Their decisions and actions convey good judgment

The 4C's of Identifying & Developing Your Future Leaders



Free Resource

Defining Capabilities



COMPETENCE

Does this person have the functional and leadership skills to achieve results?

Options for Developing a Company Competency Profile

What competencies differentiate leadership performance in your organization?

1. Study high and low performers
2. Expert analysis
3. Psychometric analysis



Defining Capabilities

Developing a Company Competency Profile



COMPETENCE

Does this person have the functional and leadership skills to achieve results?

What competencies differentiate leadership performance in your organization?

Study behaviors of high and low performers:

- Interview
- Observe
- Find key success essentials

Defining Capabilities

Developing a Company Competency Profile



COMPETENCE

Does this person have the functional and leadership skills to achieve results?

What competencies differentiate leadership performance in your organization?

Expert analysis:

- Interviews
- Card Sort Exercise.
- Online pairing – ExecuSmart Success Profile

Defining Capabilities

Developing a Company Competency Profile



COMPETENCE

Does this person have the functional and leadership skills to achieve results?

What competencies differentiate leadership performance in your organization?

Psychometric analysis:

- Validated assessments – correlate results with performance
- Examples: LTI, Hogan, and Watson Glaser
- Provides benchmark data

Defining Capabilities

Leading Forward – Market Driven Leadership Competencies

Key Market Forces:

- Globalization/Regionalization
- New markets
- Mature/declining markets
- Increased complexity
- Regulatory changes
- Changing demographics
- Consolidation/mergers

What are the leadership capabilities required to execute current business?



Potential Leadership Capabilities:

- Innovation/change leadership
- Vision/strategy development
- Managing ambiguity
- Matrix management
- Analytical decision making
- Market awareness & anticipation
- Influence without direct authority

Purpose: Provide a framework for developing your future leaders



How - Developing Leaders

- Development planning – 70:20:10
- Experiential learning – characteristics of crucible positions

Developing Leaders

THE 70:20:10 MODEL



70%

LEARN & DEVELOP THROUGH EXPERIENCE

- Stretch Roles
- Cross-functional assignments
- Guided practice



20%

LEARN & DEVELOP THROUGH GROUP & OTHERS

- Observation
- Coaching & Mentoring
- Guided Discussion



10%

LEARN & DEVELOP THROUGH STRUCTURED COURSES & PROGRAMS

- Formal Training
- Degrees
- Certifications

Developing Leaders



Developing Leaders

Characteristics of Crucible Positions

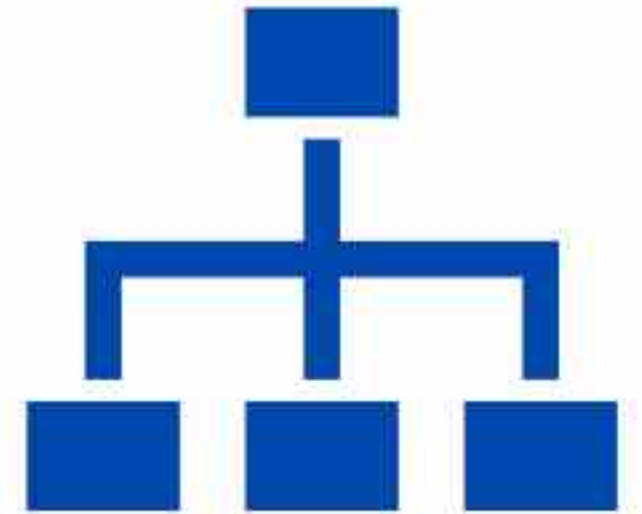
1. Success and failure were both possible
2. Required assertive, individual “take charge” leadership
3. Involved working with new or a lot of people, or both
4. Created additional personal pressure
5. Required influencing people
6. Involved high variety and diversity
7. Was watched closely and monitored by people whose opinion counts
8. Required building a team or something from scratch
9. Involved a tremendous intellectual/strategic/problem solving challenge
10. Involved interacting with a significant boss
11. Was missing something important

Purpose: Provide a framework for developing your future leaders



Enterprise Tools

- Succession pools
- Performance and potential – 9/6 Box
- Effective use of assessment
- Best practices for talent management
- Getting starting – engaging your leaders



Enterprise Tools

Succession Pools at Each Level



Selection Assessment & Broad Development:

- Identify & develop potential
- Engage supervision in development

Early Talent Prospects

Early career professionals showing C-Suite/ BU Leadership promise

Individual Assessment & Development:

- Focus on "next level" capabilities
- Engage sr. management in development

Mid-Career Talent Prospects

Likely to be BU leaders, and potentially C-Suite leaders

In-Depth Assessment & Development:

- Focus on high-level executive capabilities
- Engage C-Suite & BOD in development

C-Suite Candidates

Candidate for C-Suite in the next 0-3 years

C-Suite

Candidate for CEO in the next 0-3 years



Enterprise Tools

Typical Succession Pools in Nonprofits



Broad Development:

- Identify & develop potential
- Engage supervisor in development

Early Talent Prospects

Early career professionals showing C-Suite Leadership promise

In-Depth Assessment & Development:

- Focus on high-level executive capabilities
- Engage C-Suite & BOD in development

C-Suite Candidates

Candidate for C-Suite in the next 0-3 years



Enterprise Tools

Manage Both Talent Pipeline and Targeted Successors

1. Leadership pipeline development



3. Key position pools for critical jobs

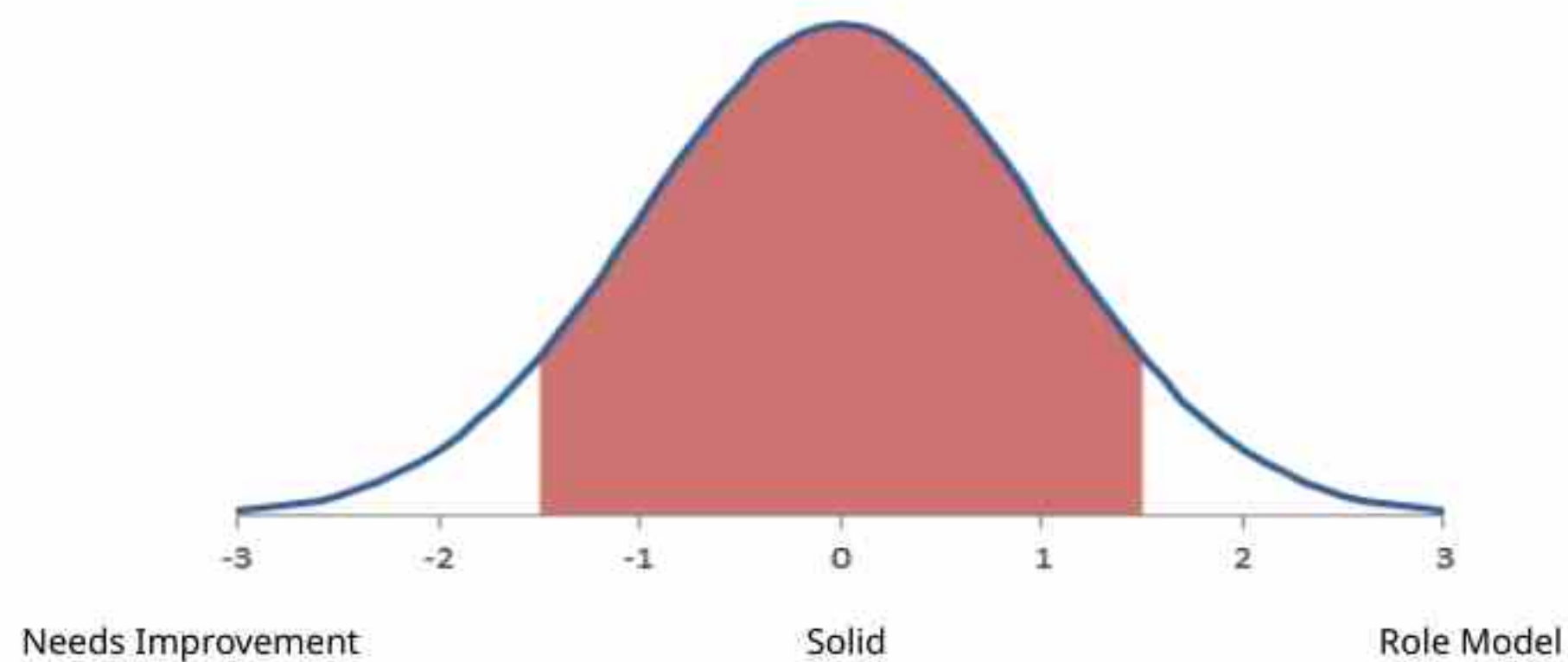
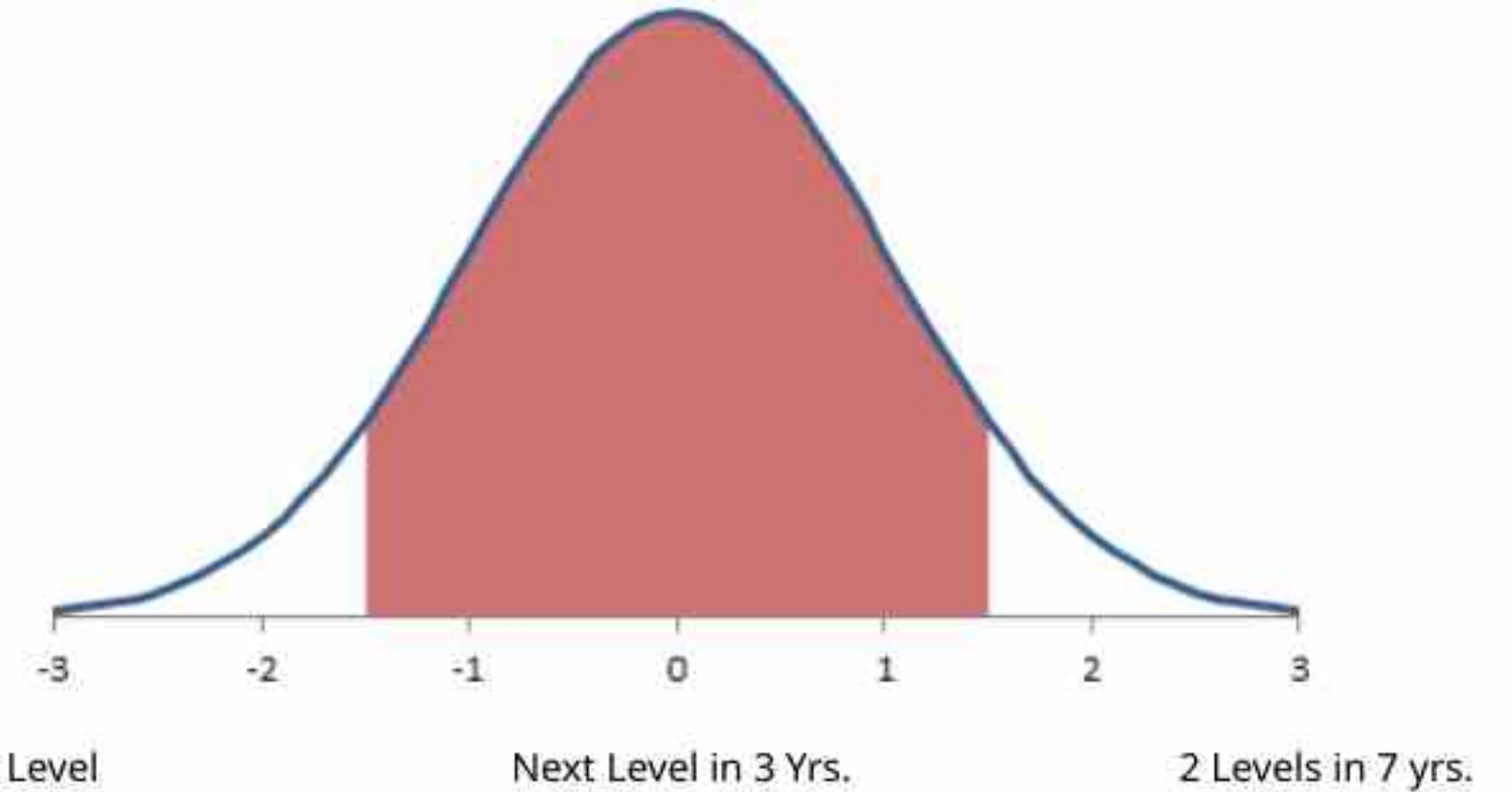
- Plant Director
- Marketing Category Director
- BU Controller
- TBD

2. Immediate Successors

	Susan Example VP Supply Chain	Andy Example VP Marketing BU
Ready Now	Mary Example Sr. Director Logistics	Barry Example Category Director
Ready 1 - 2 Years	Ted Example Sr. Director Coffee Quality	Karen Example Category Director
Ready 3 - 5 Years	Diane Example Plant Director	Steve Example VP BU Finance
Emergency Backup	Mary Example Sr. Director Logistics	Barry Example Category Director

How – Enterprise Tools

Performance/Potential Matrix



Performance

Potential

How – Enterprise Tools

Performance/Potential Matrix

Potential	2 Levels in 7 yrs.			
	Next Level in 3 Yrs.			
	Grow At Current Level			
		Needs Improvement	Solid	Role Model
		Performance		

How – Enterprise Tools

Sample – Performance/Potential Matrix

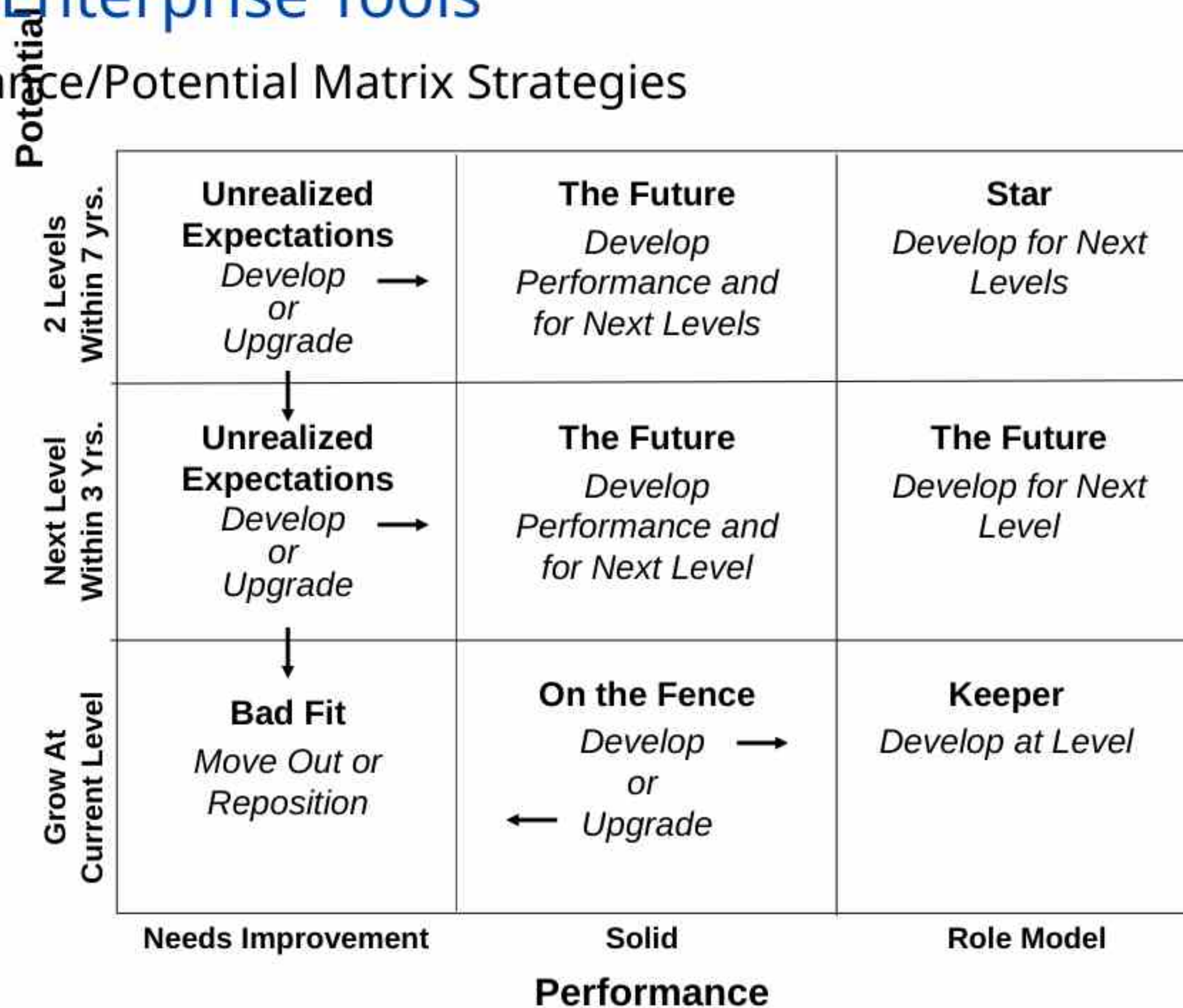
Potential	2 Levels in 7 yrs.	Faith Abbott	Chris Mederos Terry Moore Tyler Barry	Juan Fernandez Kathy Johnson Bob Elam Susan Glen
	Next Level in 3 Yrs.	Bill Miller Haley Halter Gene Gause Michelle Feldman Brad Aleman Alex Bierman	David Lorack Bill Sloan Shelly Holland Maryanne Edgeworth	Michele Meyer Andrew Harris Steeve Casaday Bruce Wheeler
	Grow At Current Level	Jamie Donnelly Phelice Finestein John Harris Danny Armstrong Carey Saucier	Perry Wozniak Bob Thomason Elly Aleman Mary Melby Deter Echelard Skip Walker Julian Miranda	Denise Jones Joseph Gregory Rhonda Lamkin Patrick Quinn Shelia Mangan Jack Sowa
		Needs Improvement	Solid	Role Model
		Performance		

Regions:

- Northeast
- Central
- South
- West

How – Enterprise Tools

Performance/Potential Matrix Strategies

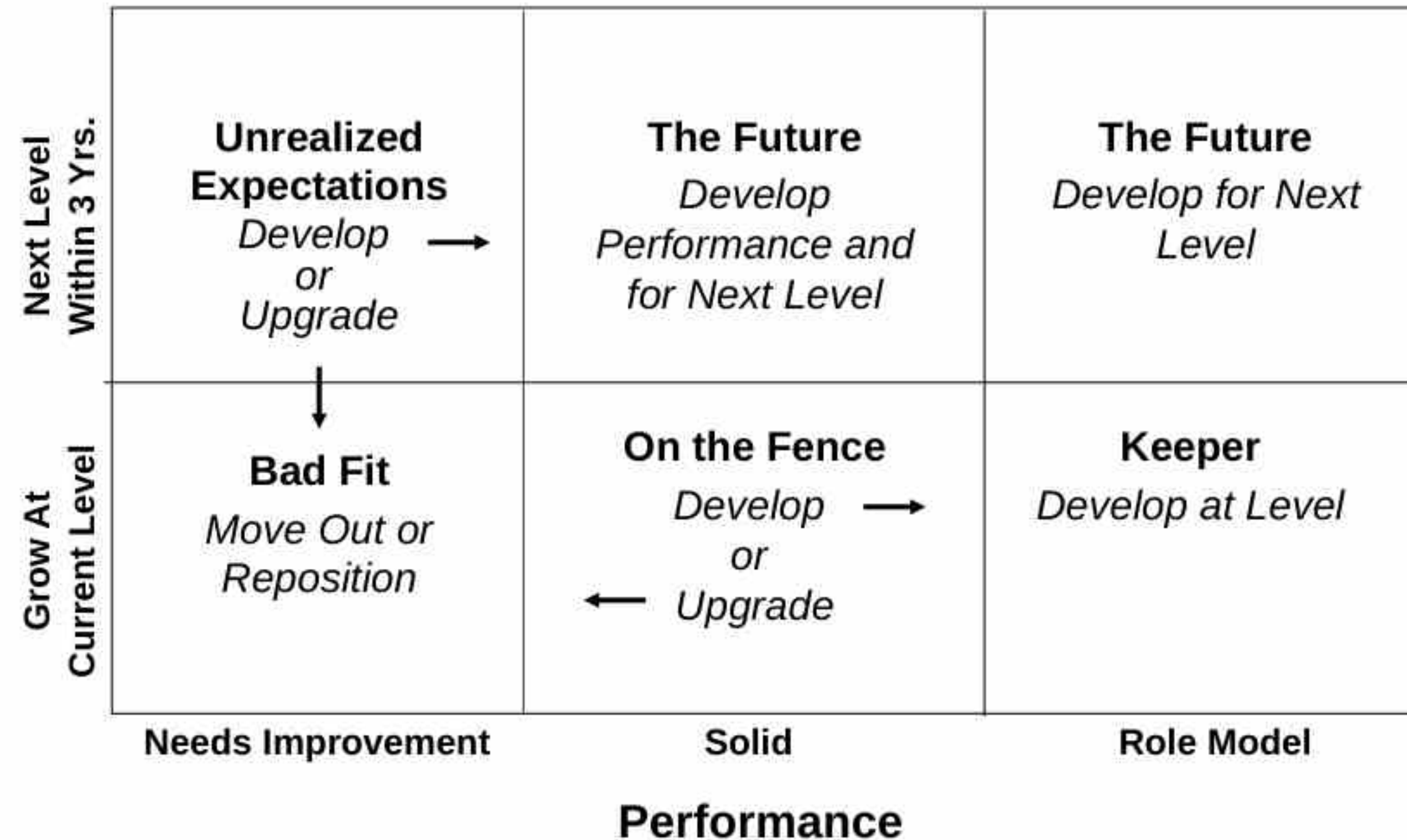


How – Enterprise Tools

Performance/Potential Matrix Strategies

Flatter organization – 4 levels

Potential





Faulty methods for predicting fit & potential

- People who interview well.
- People who have a profile similar to current leaders – look, demeanor, style.
- People who are liked.
- People who attended the “right” college.
- People who worked at branded companies.

Surface-level assessments are convenient and give the illusion of rigor, however, they're loaded with bias and lack predictive insight.

How – Enterprise Tools

Power of Validated Assessment

Validated assessments bring deeper insight for selection, onboarding, and focused development:

- › **Predictive** – Assessments more accurately and consistently identify and develop talent.
- › **Descriptive** – Assessments enable managers to gain valuable behavioral insights, tendencies and preferences into individuals.
- › **Connect the Dots** – Assessments can help organizations link their talent management systems (integration) and focus talent measurement on areas that matter to the business (alignment).
- › **Protection** – An assessment program that is implemented correctly, consistently and in partnership with a trusted assessment partner, helps protect an organization from potential legal exposure and issues.
- › **Standardization** – Assessments help increase the structure and consistency of an organization's talent selection and development processes.
- › **Objectivity** – Assessments introduce a higher degree of objectivity into their talent selection and development processes, therefore reducing potential subjectivity and bias.



How – Enterprise Tools

Developing Potential – Invest in Top Talent

Self-awareness and ongoing competency development through proven tools such as:

- › **360 Assessment** – Multi-rater focused feedback with support for report interpretation, development planning and actioning.
- › **Mentor** – Seasoned and safe sounding board and confidant.
- › **Coach** – Experienced accountability partner and guide in support of focused development and learning from experience.
- › **Formal review of progress** – quarterly discussion with Human Resources, Manager and/or succession committee.



How – Enterprise Tools

Succession Metrics of the Health of the Talent Pipeline

- Percentage of “Ready Now” candidates
- Percentage of roles with candidates ready in less than two years
- Percentage of roles with no candidates ready within 2 years
- Diversity of the candidate pool
 - Age – race – gender - experience*
- High potential candidate retention
- Internal promotion percentage (average 50-70%)

- 
- › Overall
 - › At Level
 - › Within functions

How – Enterprise Tools

Succession Best Practices Scorecard

Succession and leadership development is a clear Board priority: Ongoing formal and informal interaction with Talent Prospects, including field visits



Leadership development was elevated to the same importance as business strategy: Executive Team had regular candid conversations with, and about, key talent



Executives and Talent Prospects “belonged to the company” – movement and development is discussed, managed and monitored closely



Succession and leadership development is focused on strategic company requirements (e.g. increasingly Global, higher complexity)



Integrated systems in place – performance review, training and assignment management



Consistency in evaluation is driven through key criteria/competencies and formal assessment



Focus on learning through experience - rotational, rounding and “crucible” assignments



Invest strategically in a pool of talent with significant potential



**Percent
Complete**

Sources:

- Harvard Business Review The Art and Science of Finding the Right CEO,. A.G. Lafley & Noel Tichy. Oct, 2011
- Talent Masters, Why Smart People Put People Before Numbers. Bill Conaty & Ram Charan. Crown Business, 2010
- Center for Creative Leadership study of over 2,000 companies



If **your leadership legacy** were defined
by **who you built**—not what you built—

How would you lead differently starting tomorrow?



Free Resources



Impactful Talent Solutions



The 4C's of Identifying &
Developing Your Future Leaders



Talent Assessment Advantage
eBook

WWW.CAREERMP.COM

Real-Time Talent Insights

Annual National Pulse Checks & Reporting



Questions?



Joe Frodsham
joef@careermp.com