



**MOVING
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FUTURE**
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**SEPTEMBER 11-13 2017
PROVO, UT
UTAH VALLEY CONVENTION CENTER**

Succession Planning “Brain-Drain Prevention”

Provo, UT
September 11, 2017

MERCURY

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About the Instructor



Steve Saltzgiver
CAFS, MAOM

- More than 40 years' experience beginning as a truck assembly worker, commercial driver and fleet maintenance journey technician, local municipal fleet manager and director over two large state government fleets (Utah and Georgia)
- Vice President of fleet operations for two fortune 500 corporate operations (Coca-Cola and Republic Services) and fleet management consultant.
- Recipient of multiple industry awards including, 2000 Honda Motors Environmental Leadership award, 2015 Sustainable Fleet Award, 2017 Government Hall of Fame Inductee and Legendary Achievement Award.
- Successfully transitioned from wrench-tuner to manager of a \$1.5 billion (annual capital and operating budget), 50,000-unit fleet.
- Certified Automotive Fleet Supervisor (CAFS) from NAFA Fleet Management Association and currently serving on the NAFA Board of Directors.
- Holds Business Management and a Masters of Organizational Management degrees from the University of Phoenix.

About Mercury Associates, Inc.

- Largest dedicated fleet management consulting company in North America
- More than 600 clients served, with fleets of <100 to >200,000 vehicles and pieces of equipment
- Company's mission is to help organizations improve fleet management practices, improve fleet performance, and reduce fleet costs



MERCURY

Key Mercury Associates Services

- Fleet Management Best Practices Studies
- Fleet Management Program Consolidation and Organizational Restructuring Studies
- Fleet Cost Analysis, Reduction, and Containment Studies
- Fleet Utilization, Optimization, and Rightsizing Studies
- Fleet Management Information System Requirements Definition, Acquisition, Implementation, Hosting
- Outsourcing Feasibility Studies

Key Mercury Associates Services

- Development of Requirements, Specifications, and Tenders – Vehicles, Services, Information Systems
- Supplier Selection, Contract Negotiation, and Performance Reviews
- Determination of Optimal Vehicle Replacement Cycles
- Evaluation of Lease versus Buy and other Capital Financing Strategies
- Financial Audits of Fleet Leasing Company and other Supplier Invoices
- Management Training

Sample Mercury Associates, Inc. Clients

Corporate

- 3M
- Air Products
- Aramark
- Bell Canada
- Carolinas HealthCare System
- Danella
- GlaxoSmithKline
- Honeywell
- Hunt Brothers Pizza
- Intel
- Johnson & Johnson
- Johnson Controls
- Lancaster Foods
- Pfizer
- Quanta Services
- Rockwell-Collins
- Schindler Elevator

Utilities / Fuel / Rail

- Alyeska Pipeline Service Co.
- BNSF Railway
- Bonneville Power Authority
- BP Alaska
- British Columbia Hydro
- Cudd Energy Services
- EPCOR
- Flint Hills Resources
- Georgia Power Company
- Gulf Stream Marine
- Hoosier Energy
- Horizon Utilities
- Hovensa
- Pacific Gas & Electric
- Southern California Edison
- Suncor
- UGI Utilities
- Whiting Oil & Gas

Government/Other

- US Army, Navy, Air Force, Marine Corps
- US Departments of Agriculture, Defense, Energy, Homeland Security, Interior, Labor, State, Veterans Affairs
- US Postal Service
- Smithsonian Institution; NASA
- Canada Post
- LDS Church
- RAND Corporation
- Goodwill Industries
- Transportation Research Board
- 33 of 50 largest cities in the US, including 10 largest;
- 3 of 5 largest cities in Canada
- 35+ state and provincial governments
- 40+ colleges and universities

Today's Discussion

As more and more baby-boomers retire and exit organizations, it's becoming ever increasingly paramount for organizations to capture institutional knowledge before they experience "Brain-Drain." Failing to encapsulate knowledge will hamper employee replacement transition, drive up costs, and impact customer service delivery.

Learning Objectives:

- Why is succession planning important and what is succession planning?
- Why retaining institutional knowledge is important for organizational success.
- Employee tasks and activities plan prior to an employee's termination or retirement.
- Processes that can be used to prevent Brain-Drain" and improve succession planning
- Case study: How successful fleet managers tackled this challenge before exiting their organization.

Why Do Organizations Need Succession Planning?

- Baby-boomers Exiting Workplace Due to Retirements
- Brain-drain Avoidance – Loss of Many Years of Institutional Knowledge
- Accelerated Complexity of Vehicles Related to Technology Advances
- Shortage - Qualified Pool of Fleet Technician Candidates and Millennial Work Expectations
- Lack of Formalized Mentoring and Succession Programs

Why is Succession Planning important?

Depending on which study or survey you accept below are a few facts to consider:

- 33% of business owners plan to exit in the next 5-10 years
- 10% of businesses have a formal succession plan
- 38% have an unwritten or informal succession plan
- 52% have no succession plan at all
- Over \$1.2 Trillion in business assets will be transferred to new leadership

Why is Succession Planning important?

- Bureau of Labor reports tech supply growing 2.6% and demand growing 0.7% annually – Quality v. Quantity
- Turnover/rehire equals 3X employee's salary to replace
- 40-50% of technicians will retire in the next 15 years...
- Over 40 % of businesses struggling to fill vacancies.
- Over 1m unemployed veterans w/perfect skills for industry
- Average age of vehicles is rising (9.1 years), requiring > Techs
- Techs are predominantly male workforce between ages 40 and 49
- Estimated 20-25% of technicians receive no fringe benefits and less than 50% are covered by a medical plan
- Average technician works about 44 hours a week.
- Average salary for a technician is \$43,000, but Advanced Technicians can earn up to \$57,000

Why Do Organizations Need Succession Planning?

9 Trends in Public Fleet Management September 2016, Government Fleet Magazine by Thi Dao

...“Vince Lorefice, director of Public Works for the Town of Wickenburg, Arizona agreed it has been hard to find talented fleet technicians, partially due to the fact that it’s not viewed as a prestigious job.”

...“Lorefice said the [FleetPros} is aware of this problem, and the group has been focusing on succession planning for the past few years in an attempt to train the next generation of fleet managers, providing classes on topics such as management skills and analyzing data through its Future Leaders program.”

Why Do Organizations Need Succession Planning?

Workforce Magazine [Excerpt]*

... “Jim Skinner, former CEO of McDonald’s Corp., was known to tell managers: “Give me the names of two people who could succeed you.” It was just one way the CEO continued the culture of succession planning at McDonald’s.”

...“It was an understandable priority considering Skinner only landed in the role in 2005 after two other CEO’s died suddenly over the course of just two years. And when he retired in 2012, Skinner was confident that his successor, Chief Operating Officer Don Thompson, was ready to take over, because he spent much of his seven years mentoring him.”

**<http://www.workforce.com/2013/03/11/succession-planning-roadmap/>*

What is a Succession Plan?

- Succession plans are a methodology for old leaders to identify and develop new leaders when they leave, retire or exit the workplace
- Succession plans have been used for centuries by dictators and monarchies to prevent power struggles, coos and chaos
- Succession planning has been used by large companies (e.g., GE, IBM, Coca-Cola, MS, Marriott, etc.) for decades to maintain continuity
- Succession planning (i.e., apprenticeship programs) was used by trade crafts for years

What are the Critical Factors in a Succession Plan?

Clear objectives are critical to establish an effective succession planning program:

- Identify those potential employees with talent needs
- Provide critical development experiences for potentials
- Engage leadership support in talent development for key roles
- Build a talent program to make better staffing decisions
- Initiate programs for employee engagement and morale
- Improve employee commitment and retention
- Implement career development programs for employees
- Develop internal candidates and reduce external recruiting needs and costs

What Elements are Related to Succession Planning?

- Annual Company/Employee Goal Setting Process
 - *Personal Performance Objectives (PPOs)*
- Employee Performance Evaluations
 - *Annual evaluation process & ratings*
- Employee Engagement Monitoring and Measuring
 - *Annual or Biennial Employee Surveys*
- Talent Review and Rating Process
 - *9 Box Assessment & Rating Process*
- Career Development Planning Process
 - *Individual Development Plans (IDPs)*
 - *Performance Improvement Plan (PIP)*

How Does an Organization Development a Succession Plan?

Steps to Successful Succession Planning

Step 1: Identify Key Areas and Positions

Determine who is interested in and has the potential to fill key areas and positions

- Discuss career plans and interests with employees
- Identify the key areas and positions that are vulnerable and the candidates who are ready to advance or whose skills and competencies could be developed within the required time frame
- Ensure that a sufficient number of bilingual candidates and members of designated groups are in the feeder groups for key areas and positions

Step 2: Identify Capabilities for Key Areas and Positions

To establish selection criteria, focus employee development efforts, and set performance expectations, you need to determine the capabilities required for the key areas and positions identified in Step 1:

- Identify the relevant knowledge, skill (including language skills), abilities, and competencies needed to achieve organizational business goals
- Use key leadership Competencies profiling to assess employee skills
- Inform employees about key areas and positions and required capabilities

Step 3: Identify Interested Employees and Assess Them Against Capabilities

Determine who is interested in and has the potential to fill key areas and positions:

- Discuss career plans and interests with employees
- Identify the key areas and positions that are vulnerable and the candidates who are ready to advance or whose skills and competencies could be developed within the required time frame
- Ensure that a sufficient number of bilingual candidates and members of designated groups are in the feeder groups for key areas and positions

Step 4: Develop and Implement Succession and Knowledge Transfer Plans

Incorporate strategies for learning, training, development, and the transfer of organizational knowledge into your succession planning and management

- Define the learning, training, and development experiences that your organization requires for leadership positions and other key areas and positions
- Link employee learning plans to the knowledge, skills, and abilities required for current and future roles
- Discuss with employees how they can pass on their corporate knowledge

Step 5: Evaluate Effectiveness

Evaluate and monitor succession planning and management efforts to ensure the following:

- Succession plans for all key areas and positions are developed
- Key positions are filled quickly
- New employees in key positions perform effectively
- Members of designated groups are adequately represented in feeder groups for key areas and positions

How to Assess Employee Talent Management?

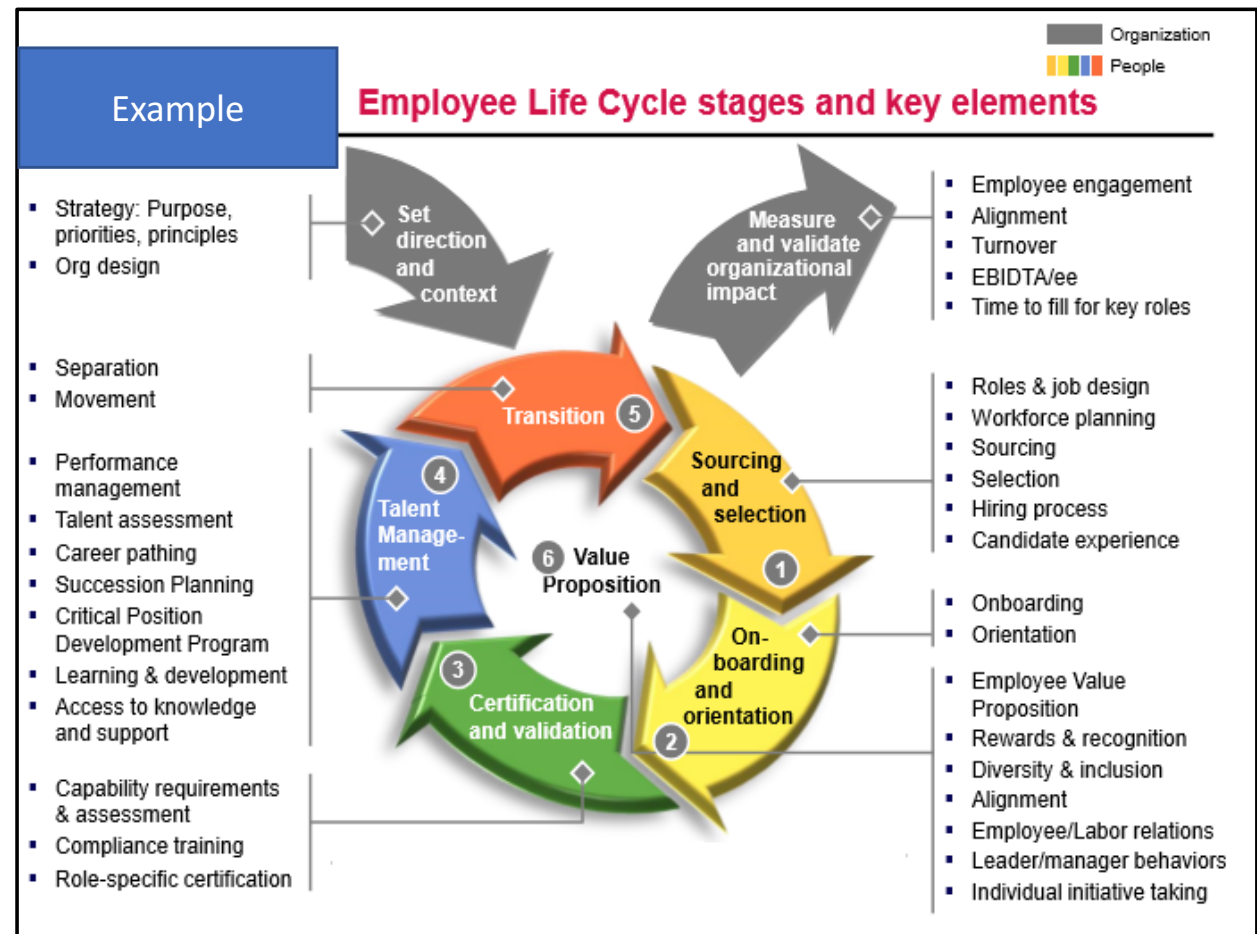
Pre-Hire, Acquisition, Development, Performance, Promotion and through Termination

Industry Best Practices – Talent Management and Review Process

Effective Employee Management Processes

Key Elements:

- Policies and procedures
- Standard operating procedures
- Structured interview guides (SIG)
- Onboarding Plan
- Individual Performance Objectives (IPO) aligned to company goals
- Individual Development Plans (IDP)
- Employee evaluation and appraisal process
 - Self-assessments
 - Mgr. assessments
- Talent rating calibration
- Performance Improvement Plan (PIP)



Talent Assessment and Rating Processes

Overview

There are four (4) parts to the Talent Assessment process:



Industry Best Practice – Talent Review

Talent Rating/Ranking

- Talent assessment* and ranking employees provides guidance on organizational status
- View and fill talent gaps proactively
- Determine top and bottom performers
- Managers can focus on employee performance goals
- IDPs for Top and PIPs for bottom performers

**Sample "9-Box" rating/ranking process - SAP Career Factors*

9-Box Talent Assessment Tool

	9-Box Talent Assessment Tool		
	3 – Potential Player <ul style="list-style-type: none"> • Does not meet performance expectations or has inconsistent past performance • Has been acknowledged as a team player • Has demonstrated behaviors and competencies beyond current position • May be in the wrong job or having non-work related distractions 	2 - Emerging Star Player <ul style="list-style-type: none"> • Past record of steady, consistent performance • Acknowledged as a leader and/or role model • Demonstrates behaviors and competencies beyond current role • Often acts at a level of capability of the next level of the organization • Must be willing to relocate 	1 - Star Performer <ul style="list-style-type: none"> • Past record of consistently and/or significantly exceeding performance expectations • Acts at a level of capability of at least the next level in the organization • Acknowledged as a skilled situational leader and role model • Has wide spread influence beyond current role • Must be willing to relocate
Potential	6 - Questionable Performer <ul style="list-style-type: none"> • Does not meet performance expectations or has inconsistent past performance • Probably capable of making a stronger contribution • Has expressed interest in career advancement • May be in wrong job or having non-work related distractions 	5 - Valuable Player <ul style="list-style-type: none"> • Past record of steady, consistent performance • Shows signs of being a leader and role model • At times exhibits competencies beyond current role • May be new in position within the last six months • Has demonstrated interest in career advancement 	4 - Strong Player <ul style="list-style-type: none"> • Past record of consistently and/or significantly exceeding performance expectations • Often acts at a level of capability of the next level in the organization • Acts as a leader and/or role model • Exhibits many competencies and behaviors beyond current position • Has demonstrated interest in career advancement
	9 - Low Performer <ul style="list-style-type: none"> • Does not meet performance expectations or has inconsistent past performance • Difficulty performing satisfactorily in his/her current position • May not be interested in advancement 	8 - Steady Performer <ul style="list-style-type: none"> • Past record of steady, consistent performance • Overall meets expectations in his/her position • May not be seen as a leader in his/her area of expertise • May have reached full potential, or may not be interested in advancement 	7 - Solid Performer <ul style="list-style-type: none"> • Past record of consistently and/or significantly exceeding performance expectations • May have reached full potential, or may not be interested in advancement • Is a real pro in his/her position • Is seen as a leader in his/her area of expertise
		Low Performance	Solid Performance
	Performance (Results + Behavior)		

Industry Best Practice – Talent Review

Talent Rating/Ranking

1. Star Performer

- Past record of consistently and/or exceeding performance expectations
- Acts at a level of capability of at least the next level in the organization
- Acknowledged as a skilled situational leader and role model
- Has wide spread influence beyond current role

Ready to advance to next level in 6 to 12 months

9-Box Talent Assessment Tool				
		3 – Potential Player	2 - Emerging Star Player	1 - Star Performer
Potential	High Potential	<ul style="list-style-type: none"> • Does not meet performance expectations or has inconsistent past performance • Has been acknowledged as a team player • Has demonstrated behaviors and competencies 	<ul style="list-style-type: none"> • Past record of steady, consistent performance • Acknowledged as a leader and/or role model • Demonstrates behaviors and competencies 	<ul style="list-style-type: none"> • Past record of consistently and/or significantly exceeding performance expectations • Acts at a level of capability of at least the next level in the organization • Acknowledged as a skilled situational leader and role model • Has wide spread influence beyond current role • Must be willing to relocate
	Solid Potential	<ul style="list-style-type: none"> • Does not meet performance expectations or has inconsistent past performance • Probably capable of making a stronger contribution • Has expressed interest in career advancement • May be in wrong job or having non-work related distractions 	<ul style="list-style-type: none"> • Past record of steady, consistent performance • Shows signs of being a leader and role model • At times exhibits competencies beyond current role • May be new in position within the last six months • Has demonstrated interest in career advancement 	<ul style="list-style-type: none"> • Past record of consistently and/or significantly exceeding performance expectations • Often acts at a level of capability of the next level in the organization • Acts as a leader and/or role model • Exhibits many competencies and behaviors beyond current position • Has demonstrated interest in career advancement
	Low Potential	<ul style="list-style-type: none"> • Does not meet performance expectations or has inconsistent past performance • Difficulty performing satisfactorily in his/her current position • May not be interested in advancement 	<ul style="list-style-type: none"> • Past record of steady, consistent performance • Overall meets expectations in his/her position • May not be seen as a leader in his/her area of expertise • May have reached full potential, or may not be interested in advancement 	<ul style="list-style-type: none"> • Past record of consistently and/or significantly exceeding performance expectations • May have reached full potential, or may not be interested in advancement • Is a real pro in his/her position • Is seen as a leader in his/her area of expertise
		Low Performance	Solid Performance	High Performance
Performance (Results + Behavior)				

Industry Best Practice – Talent Review

Talent Rating/Ranking

9. Low Performer

- Does not meet performance expectations or has inconsistent performance
- Difficulty performing satisfactorily in his/her current position
- May not be interested in advancement

Candidate for Disciplinary Action and/or Personal Improvement Plan

9-Box Talent Assessment Tool				
		3 – Potential Player	2 - Emerging Star Player	1 - Star Performer
Potential	High Potential	<ul style="list-style-type: none"> • Does not meet performance expectations or has inconsistent past performance • Has been acknowledged as a team player • Has demonstrated behaviors and competencies beyond current position • May be in the wrong job or having non-work related distractions 	<ul style="list-style-type: none"> • Past record of steady, consistent performance • Acknowledged as a leader and/or role model • Demonstrates behaviors and competencies beyond current role • Often acts at a level of capability of the next level of the organization • Must be willing to relocate 	<ul style="list-style-type: none"> • Past record of consistently and/or significantly exceeding performance expectations • Acts at a level of capability of at least the next level in the organization • Acknowledged as a skilled situational leader and role model • Has wide spread influence beyond current role • Must be willing to relocate
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		Low Performance	Solid Performance	High Performance
Performance (Results + Behavior)				

Building a Fleet Management People Capability Strategy

Next Steps:

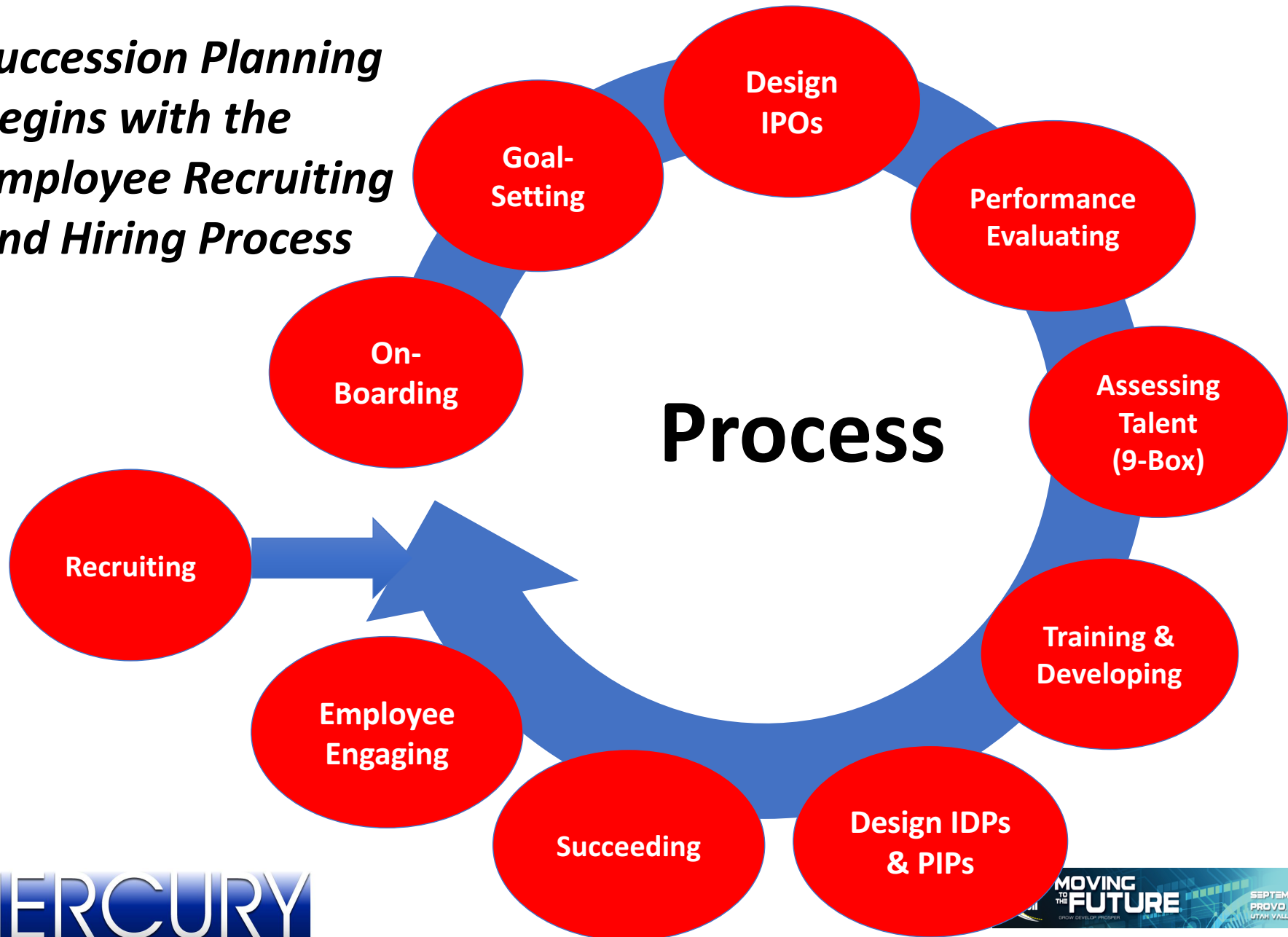
*Understanding the Relationship Between Human Resource
Management and Development of People Capability (i.e., Talent)*

People Capability – Guiding Principles

- Talent is a business problem, not an HR problem – Succession Planning is critical
- People Reflect, Protect and Preserve the Organization's Brand
- Assessing Capability is Cross-functional Effort
- Increased Diversity Drives Innovation and Competition

Understanding the Link Between People Capability and Succession Planning Cycle

Succession Planning Begins with the Employee Recruiting and Hiring Process



Challenges – Specific to Fleet

Increasingly difficult to attract adequate Maintenance Talent and capability

- Unable to attract and acquire enough talented and qualified technicians and supervision
- Fleet success, execution and durability depend on quantity and quality fleet personnel
- Unable to compete with other companies for quality Technicians
- Impacting higher outsource labor costs, increased mistakes, overtime, etc.
- Need to strengthen its fleet management skills using traditional education, internal training tools and industry recognized certification programs to better compete in the market. (e.g., University/College, Trade/Voc Schools, Intranet Learning Portal and CAFM)

Recruiting and Retaining Qualified Technicians is Challenging

What you need to understand?

1. Society has negative view of the professional technician career path.
2. Guidance counselors and parents discourage youth to consider a career in vehicle maintenance.
3. Fewer opportunities for youth to obtain experience working in automotive maintenance.
4. Vehicles more complex and youth unable or ill-equipped to work on own vehicles and cultivate interest in automotive technology.
5. Internal processes may need streamlining (or > training)

Sample: Strategies – Opportunities

Develop a “Positive” Technician Marketing Program

- Accentuate the positives of joining the fleet industry as a stable and growing workforce
- Develop a program to promote and expand the organization brand to attract larger candidate pools
- Design and implement “career fair” program to proactively market the organization’s technician opportunities
 - ✓ Work closely with government agencies (i.e., Military) to target potential candidates
 - ✓ Work with vocational schools to attract candidates
- Expand organization training opportunities and compensate technicians (one-time bonus) for each class completed with claw-back clause
- Expand engagement to increase “non-monetary” incentive programs to reward technicians for increased productivity and quality
 - ✓ Tool purchasing programs
 - ✓ Education reimbursement programs

Sample: Strategies - Opportunities

Develop a “Positive” Technician Marketing Program

- Partner with Communications Department on solutions
- Identify future need and people numbers for Fleet staff
- Expand use of Social Media websites to attract candidates
- Defined jobs and level of technical skills needed to maintain equipment.
- Effective materials necessary to persuade potential employees and those who are influential in their decision-making process.
- Designate regional employees to serve in an advisory capacity in vocational schools.
- Leverage industry tools and venues to broaden outreach (e.g., LinkedIn, CareerBuilder, Indeed, Monster, TMC, NAFA, etc.
- Prepare advance Communication packet and talking points for Leaders
- Establish Fleet “People Committee” and designate specific managers to be involved with programs that promote technician image and Company programs.

Sample: Strategies - Opportunities

Expand and strengthen Incentives and Compensation programs

- Offer “Sign-On Bonus” to incent candidates to join organization
- Develop “Apprenticeship” program to expand Technician career path toward journeyist Technician (e.g., C to A Technician in 4 years)
- Design career path to serve in Supervisor development program
- Modify “Tool Allowance” programs to better compensate Technicians for continued investment
- Strengthen the “shift pay” program differentials to mitigate threat of Technicians’ leaving (or not joining) to work desired dayshifts at higher paying companies (e.g., Government and Dealers)
- Develop an annual incentive (bonus) program to compensate Technicians with a “Claw-back” for greater retention focus
- Implement compensation program to pay for ASE (Automotive Service Excellence) continuous training (i.e., Testing and % salary bump for passing tests)

Sample: Strategies - Opportunities

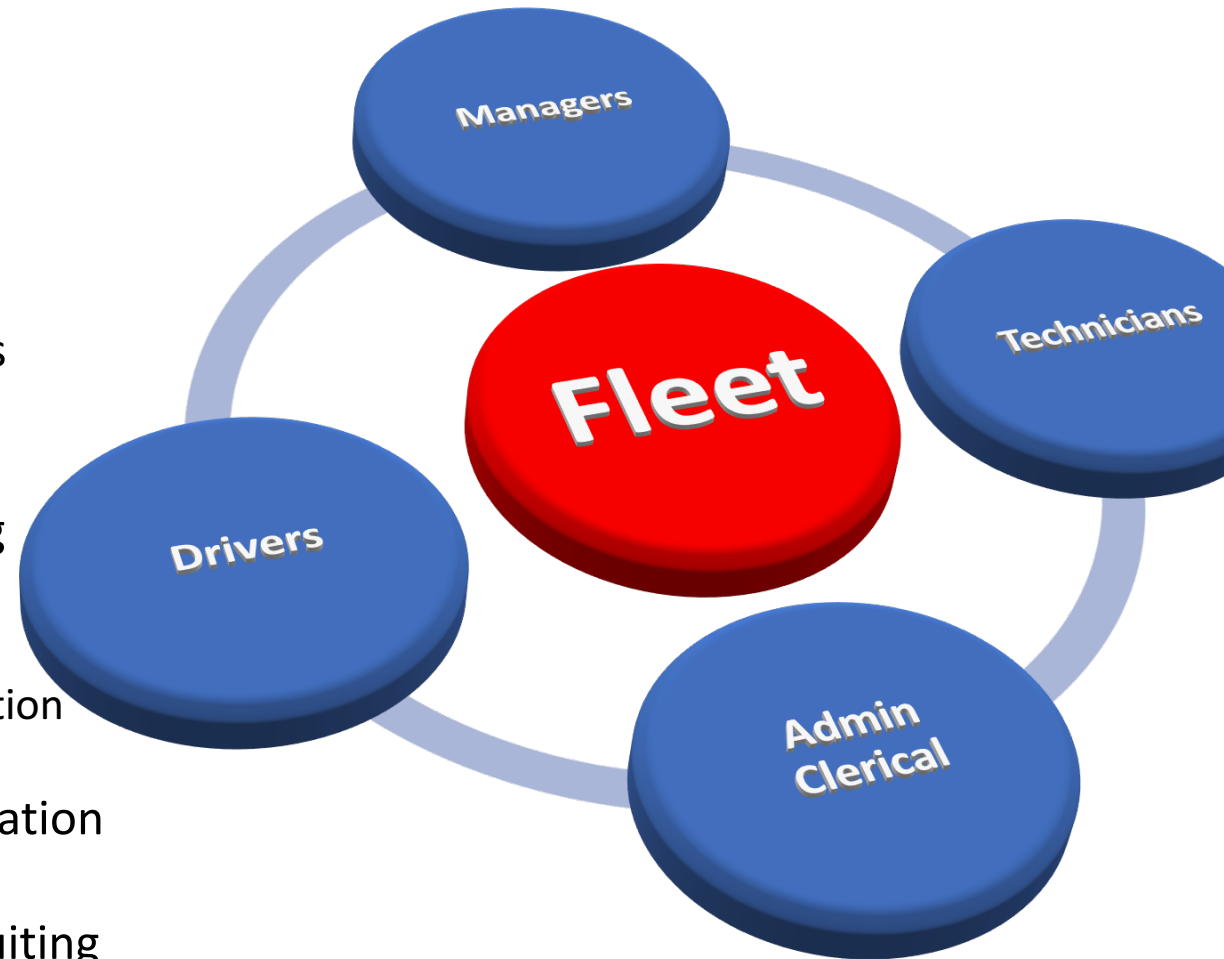
Expand your Outreach:

- Work closer with Vocational & Tech Colleges to proactively attract candidates prior to graduation (Part-Time work force)
- Increase focus on strengthening candidate pool working with diversity outreach programs
- Network early to identify High School seniors as potential candidates and develop a part-time worker program to hire students as laborers.
- Work with Government and Non-Government Organizations (i.e., church, secular groups, etc.)
- Target Veteran outreach programs to attract quality candidates from those returning from Military deployment
- Develop internal outreach program to incent employees to consider a career in Fleet Management
- Utilize retired (or soon to retire) employees as a “Succession Planning” resource to mentor newly hired associates

Sample: Fleet People Capability Initiatives

Build and Expand Capabilities:

- Linkage to Organizational goals
- Skills Assessments
- Mgr. Boot Camps
- Assistant Maintenance Manager (AMM) Program
- Individual Development Plans
- Individual Performance Objectives
- Build Internal Training Programs
 - ❑ Fleet 101, 201
- Leverage External Partner Training Venues
 - ❑ ASE/NAFA/OEM
 - ❑ Vocational Schools/Colleges (Tuition Reimburse)
- Online Learning Portal Implementation
- Certification programs
- Targeted Diversity & Military recruiting focus
- Operational Excellence
 - ❑ Lean, 6 Sigma, FMEA, DMAIC, etc.



Sample: 5 Year People Capability Plan Strategies



Transit: Example of an Industry That's Winning the Succession Planning Game!

- 15 years in Transit and participated a 4 year Apprenticeship Program to become a Journey mechanic. Many Transit orgs still have these in place.
- Apprenticeship programs work as successful succession plans

Transit Clients in California:

- Our mechanic turnover rate ranges between 2-3% annually. We hire mechanics through our apprenticeship program graduates and we hire our support staff from our apprenticeship program washouts.
- Our mechanic turnover ratio is very low but 40% of our eligible to retire in the next 5 years. This problem that will need to be addressed, however, we use our Service employees as a feeder program to the mechanic staff. Service employee are admitted to the apprenticeship program by a test.
- Then they must complete 1950 classroom hours plus On-The-Job Training. We have an in-house team of 10 instructors teaching our Master Mechanic mandatory training which requires passing 22 modules.

Questions



For Further Information

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Presentation available for download at
www.mercury-assoc.com
(click on *Resources* tab)

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