

Don't Lose Your Legacy

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A person's hands are visible, holding a white rectangular sign. The sign has red text printed on it. The background is a soft-focus bokeh of warm, golden-yellow and orange lights, with some green and blue lights visible on the right side. The text on the sign is in a bold, sans-serif font, arranged in five lines.

**THE GOAL ISN'T
TO LIVE FOREVER,
THE GOAL IS TO
CREATE SOMETHING
THAT WILL**

This time last year....

Agenda

- What it is
- Why it fails
- How to succeed
- What we've done
- Testimonials
- Take aways

What is succession planning?

- Prepare potential talent for the future
- Ensure continuity of business operations
- Ensure stability before, during and after transition



How do we succession plan?

- Development! Development!
 - Plain Language Conversations
 - Stop/Start/Continue
- Deliberate preparation
 - Active v. Passive
- This is our job

No Easy Button



One-time training session

Checked the box



The "Pre-Selected"

Those that get things done



The "Usual Suspects"

The familiar people, likable, tenured, loyal



Go with an "Outsider"

Our people "aren't ready"



The "Best of Who's Left"

Don't settle – Get Talent

Precursors to failure

- We don't know how
- We don't have time
- We defer to HR and rely on training classes
- We use the wrong evaluation tools



Training is the number one reason for failure - Forbes

Training v. Development

Training is:	Development is:
Rote	Dynamic
One-directional	Two-way (coach and student)
One-size-fits-all	Tailored and specific
Monologue lecture	Conversation
Standardize	Customize

We lose 90% of new information within one week.

Applying new information moves it from short- to long-term memory.

– *Psychology Today*

4/24/2025

The Wrong Evaluation Tools

- Grids that categorize people
 - HR's force rank grid
 - Nine-Box
- Performance Evaluations
- 360 Feedback
- Personality Tests

Current
performance is
different than
future potential

– *Lisa Schillaci*

The Right Evaluation Tool

- Objective assessment of their potential talent
 - What will they be responsible for
 - How are they expected to lead/behave
 - Observe their demonstration of new/stretch skills
- Give feedback
- Repeat as needed

Before David killed Goliath, he practiced on lions and bears.



What we did

Technical Competencies

- Catalogued and prioritized technical competencies required for the VP and Director roles. Pillars included:
 - Finance
 - Management
 - Processes
 - Systems
 - Leadership
 - KPIs
 - Innovation
 - Other

What are they
expected to do?

What we did

Leadership Competencies

- Catalogued and prioritized leadership competencies required for the VP and Director roles. Pillars included:
 - Accountability
 - Change Management
 - Communication
 - Collaboration
 - Decision Making
 - Developing Self and Others
 - Innovation
 - Teamwork
 - Trust

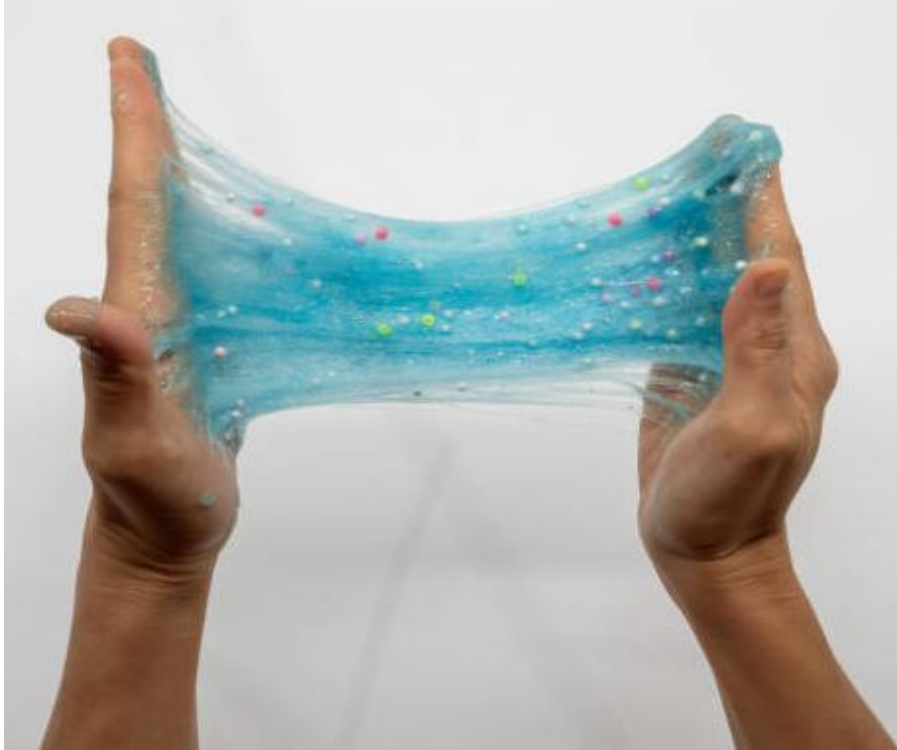
How are they
expected to
lead?

Then

- Each leader did a self-assessment of all competencies
- One-up assessed the leader in all competencies
- Mutually agreed on max of two competencies to be further developed
- Each leader created a development plan, including time frames, deliverables, resources needed

Plan to close
the gap

Make it sticky



- Include “Development of Others” into annual performance evaluation – incent them
- Include “Development of Self” into 1:1 meetings – hold them accountable

Take Aways

- No easy buttons
- Development is key
- Catalogue expectations
 - Technical
 - Behavioral
- Assess and create a gap plan
- Stretch, observe, repeat

What is one thing you can
implement today to protect your
future legacy?

Email me: lschillaci@houstonmethodist.org

I want to know!!

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