

# Don't Lose Your Legacy

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**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

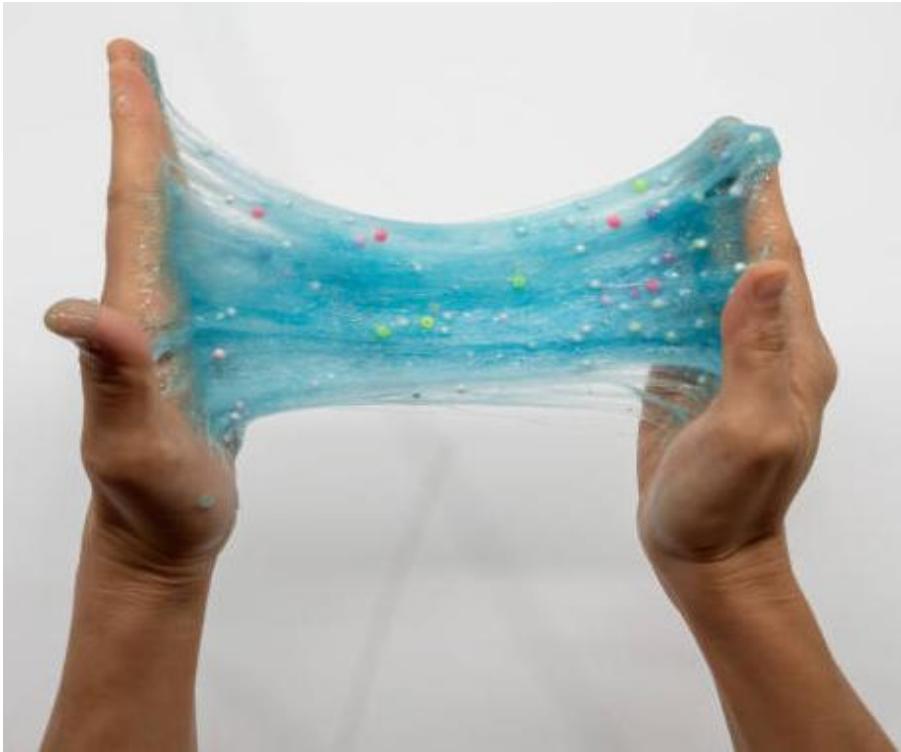
How are they  
expected to  
lead?

# 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](mailto:lschillaci@houstonmethodist.org)  
I want to know!!

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