

Who's Next? Solving Succession Planning Together

An Interactive Workshop for Private Club Leaders





What We'll Learn Today

Learn what succession planning really means, and why it matters.

Reflect on organizational strengths, gaps, and risks.

Apply design thinking to build a personalized, actionable succession framework.

Develop a prototype plan ready for peer feedback and buy-in.

1

What is Succession Planning?

Succession isn't just about replacement, it's about readiness, development, and intentional culture-building.



Succession Planning Fails: What Not to Do

Mistake	Why it Fails	Try This Instead
Promote based on tenure	Longevity \neq leadership readiness	Assess skills, potential, and readiness
Wait until it's urgent	Crisis-mode decisions limit options	Build your pipeline early
Assume you know what people want	People rarely follow assumed paths	Ask, listen, and co-create growth
Copy another club's org chart	Every culture is different	Design for your people, not someone else's plan



Framework

Clarity of Purpose

Define what matters most—your vision, priorities, and the member and employee experience you want to create.

Alignment of People & Process

Connect your goals to daily operations, people decisions, and resource allocation across all departments.

Commitment to Progress

Strategic planning isn't a one-time exercise, it's an ongoing habit of reflection, action, and accountability.



What This Really Looks Like

Clarity of Purpose →
Start with Questions

What roles or skills are critical to our future success?

Where are we most vulnerable if someone leaves?

Alignment of People & Process → **Build Everyday Habits**

Delegate with intention

Coach in real time

Cross-train your team

Involve others in projects or decisions

Document what only one person knows

Commitment to Progress → **Keep It Moving**

Regular check-ins

Identifying growth opportunities

Reviewing org charts and role clarity

Celebrating progress, not just promotions



Coca-Cola Case Study

What Happened?

- ◉ Coca-Cola experienced significant instability.
- ◉ Successors struggled because promotions based on past performance, not necessarily future readiness or cultural fit.
- ◉ There was a lack of intentional development and clear internal pipeline planning.
- ◉ *Case study will be shared in resources at the end.*



Takeaways

HBR: The Peter Principle

Just because someone excels at one level doesn't mean they will at the next. Assess future potential, not just performance.



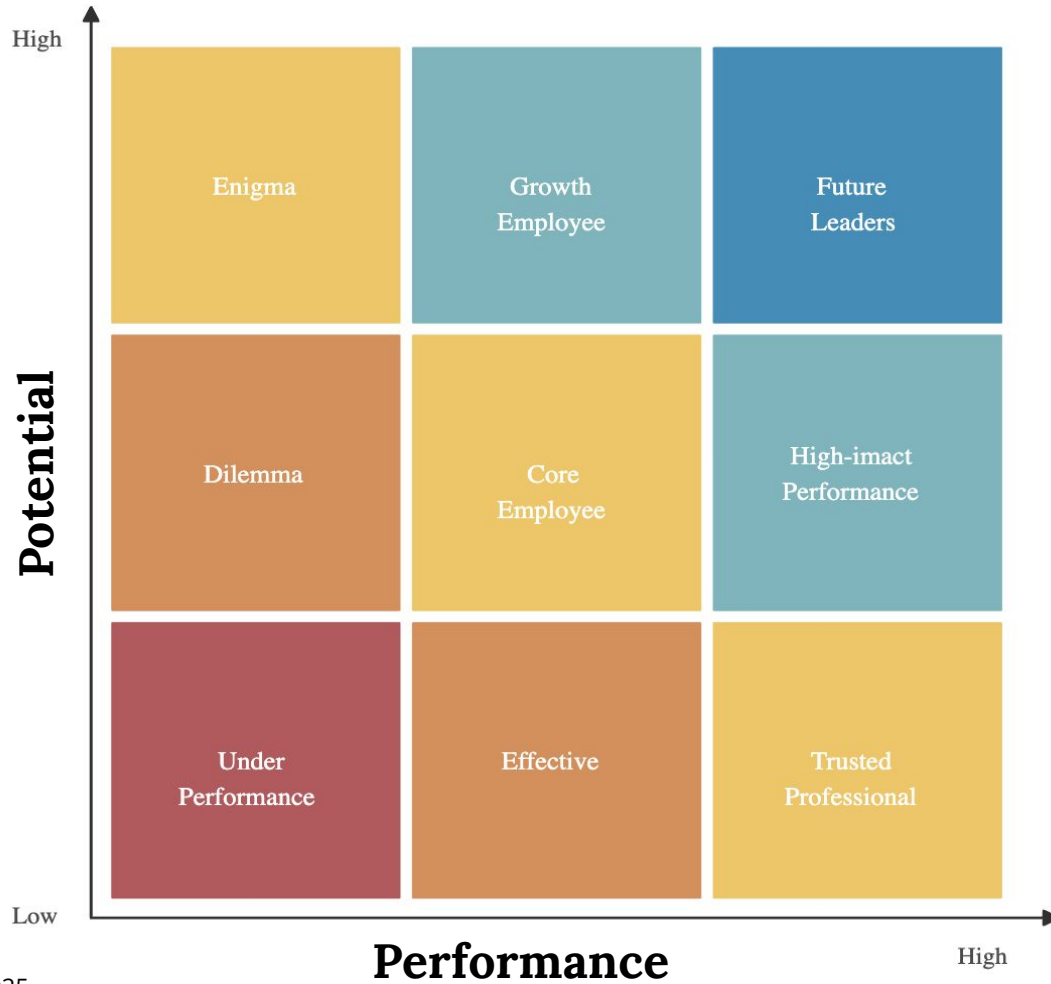
Performance vs. Potential

Performance

- ◉ What they do well *today*
- ◉ Executes tasks
- ◉ Role-focused
- ◉ Technical skills

Potential

- ◉ Who they could be *tomorrow*
- ◉ Learns, grows, adapts
- ◉ Future-focused
- ◉ Leadership skills





Takeaways

HBR: The Peter Principle

Assess skills AND readiness

Look beyond technical ability, consider leadership traits, influence, and adaptability.

Intentional development beats reactive promotion

Succession planning isn't filling a seat — it's building future leaders long before the seat is empty.



What Happens Without a Plan?

This isn't just Coca-Cola's story.



What Happens *With a Plan?*

A quick story.

The main tenet of design thinking is empathy for the people you're trying to design for. Leadership is exactly the same thing—building empathy for the people that you're entrusted to help.

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David Kelley, Founder of IDEO



Why Design Thinking Works for Succession Planning

Succession planning isn't just a checklist — it's a human-centered design challenge.



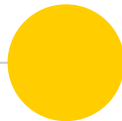
Curious



Collaborative



Creative





Design Thinking: A Human-Centered Process

Empathize

Understand people's real needs, hopes, challenges, and fears.

Define

Clearly name the right problem to solve — not just the obvious one.

Ideate

Generate creative possibilities (even wild ones) before narrowing down.

Prototype

Create a rough draft or small test version of your solution.

Test

Share it, gather feedback, and adjust to make it stronger.

Make sure that you are seeing each person on your team with fresh eyes every day. People evolve, and so your relationships must evolve with them. Care personally; don't put people in boxes and leave them there.

“

Kim Malone Scott, Radical Candor

1

Empathize, Understand Before You Act

Get Curious. Stay Curious.

Empathy is about understanding people's real needs, hopes, challenges, and fears – not just their job description.

Listen
deeply

Ask good
questions

Notice
behaviors

Assume less



Empathy Interview Guide for Succession Planning



What part of your job do you love the most? → Listen for strengths and energy.

What's something you wish you could spend more time doing at work? → Listen for passion or untapped skills.

What's been hard or frustrating for you lately? → Listen for obstacles or pain points.

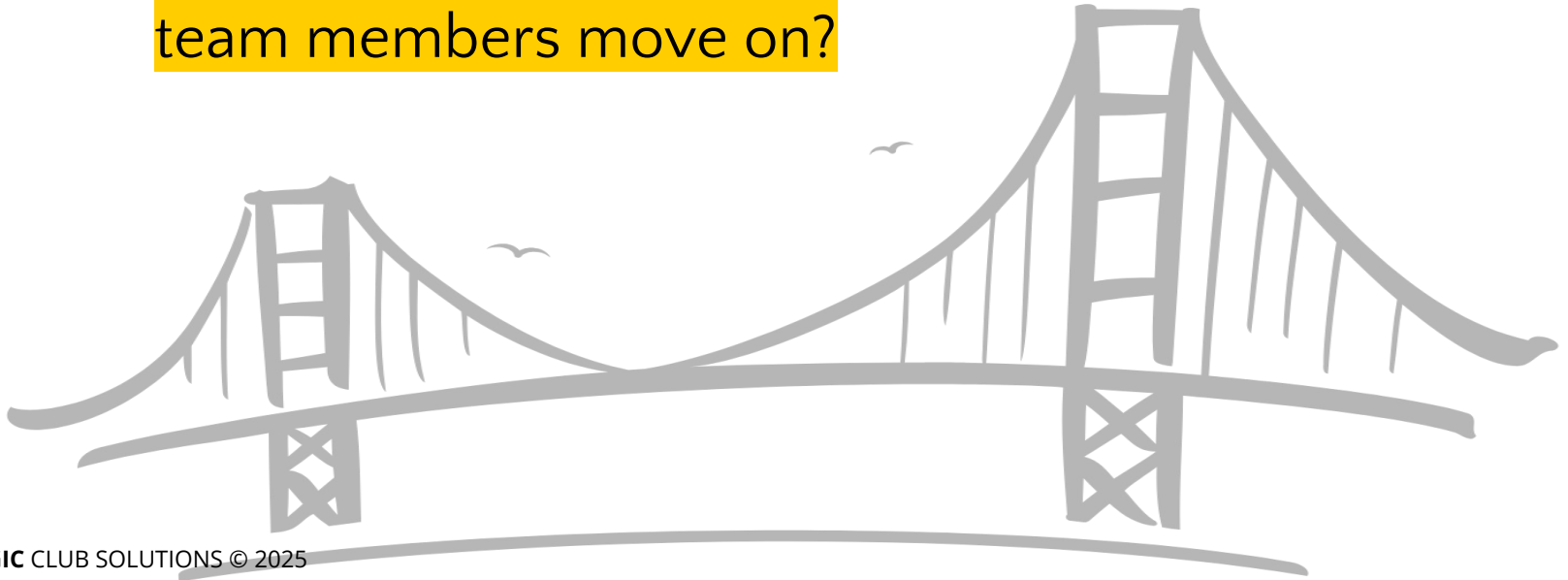
When you think about your future here, what feels exciting? What feels unclear or uncertain? → Listen for hopes and hesitations.

If you could learn or try something new at the club, what would it be? → Listen for growth potential.

2

Define the Challenge

How might we ensure continuity and growth when key team members move on?



3

Ideate – Imagine More Possibility Than Problems

The best succession plans start with curiosity,
not certainty.

Brainstorming works best when you:

Suspend judgment

Go for quantity first

Say "Yes, and..." not "Yeah,
but..."

Build on each other's ideas

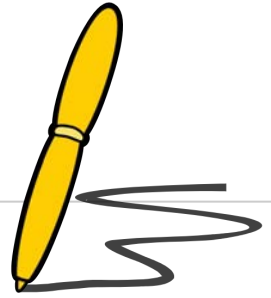
Think beyond titles (skills,
experiences, pathways)

You can always narrow down later, but you have to dream first.



Let's Brainstorm: What Could Strengthen Your Succession Plan?

- Shadowing Programs
- Documenting Tribal Knowledge
- Job Rotation or Cross-Training
- Internal "Next Role" Conversations
- Mentorship Pairings
- Skills Workshops or Certifications
- Creating Leadership Pathways for Hourly Roles
- Legacy Planning for Retiring Staff



4

Prototype – Test It Before You Perfect It

Fail fast. Fail cheap. Learn early.

The goal isn't a perfect plan – it's progress in the right direction.

Prototyping =

- Try something small
- Test in real life
- Get feedback
- Adjust before scaling





Prototype Best Practices

- ◉ Keep it small
- ◉ Time-bound
(30-60-90 days)
- ◉ Make it visible
- ◉ Get real feedback
- ◉ Treat it like a draft
- ◉ Involve the people it's for

Think like a scientist — test and learn.

5

Test — Feedback is How We Get Better

Feedback is a gift — but it takes courage to give and receive it.

When people take the time to give you thoughtful feedback, they're investing in your success.

- ◉ Share early
- ◉ Ask openly
- ◉ Receive generously
- ◉ Respond thoughtfully



How to Create a Feedback Culture

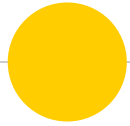
Giving Feedback

- Be honest, not harsh
- Be specific
- Focus on the work, not the person
- Offer ideas for improvement

Receiving Feedback

- Listen fully before responding
- Assume positive intent
- Ask clarifying questions
- Say thank you, every time

Feedback isn't about being right — it's about getting better together.



Design Thinking in Action

Build Your Succession Plan



Empathize

What do you know (or need to know) about your people?

I am designing for _____
who wants/needs
_____ but struggles
with _____.

*I am designing for our dining
room supervisors who want
to grow into leadership roles
but struggle with knowing
what managers actually do
behind the scenes.*



Define

What's the real challenge?

How might we _____ so
that _____?

*How might we create
real-world learning
opportunities so that our
supervisors feel confident
and prepared for future
manager roles?*



Ideate

What are possible ways forward?

Some ideas could be
_____, _____, or
_____.

Some ideas could be job shadowing, project leadership opportunities, or peer mentoring.



Prototype

What small experiment could you try?

What if we tried _____
with _____ for the next
_____ days to see if
_____?

*What if we tried job
shadowing with our dining
room supervisors for the next
30 days to see if it helps
prepare them for future
manager roles?*



Test

What feedback do I need to gather, from whom, and how will I use it to improve?

I will ask our dining room supervisors and their managers for feedback on how helpful the shadowing experience was, what worked well, and what could be improved.

Leadership is not about being in charge. It's about taking care of those in your charge.

“



Thank You!

Any **questions** ?



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scan for resources