



SUCCESSION USER MANUAL

MANTRA

Cloud HR Software to
Build a Better Workplace

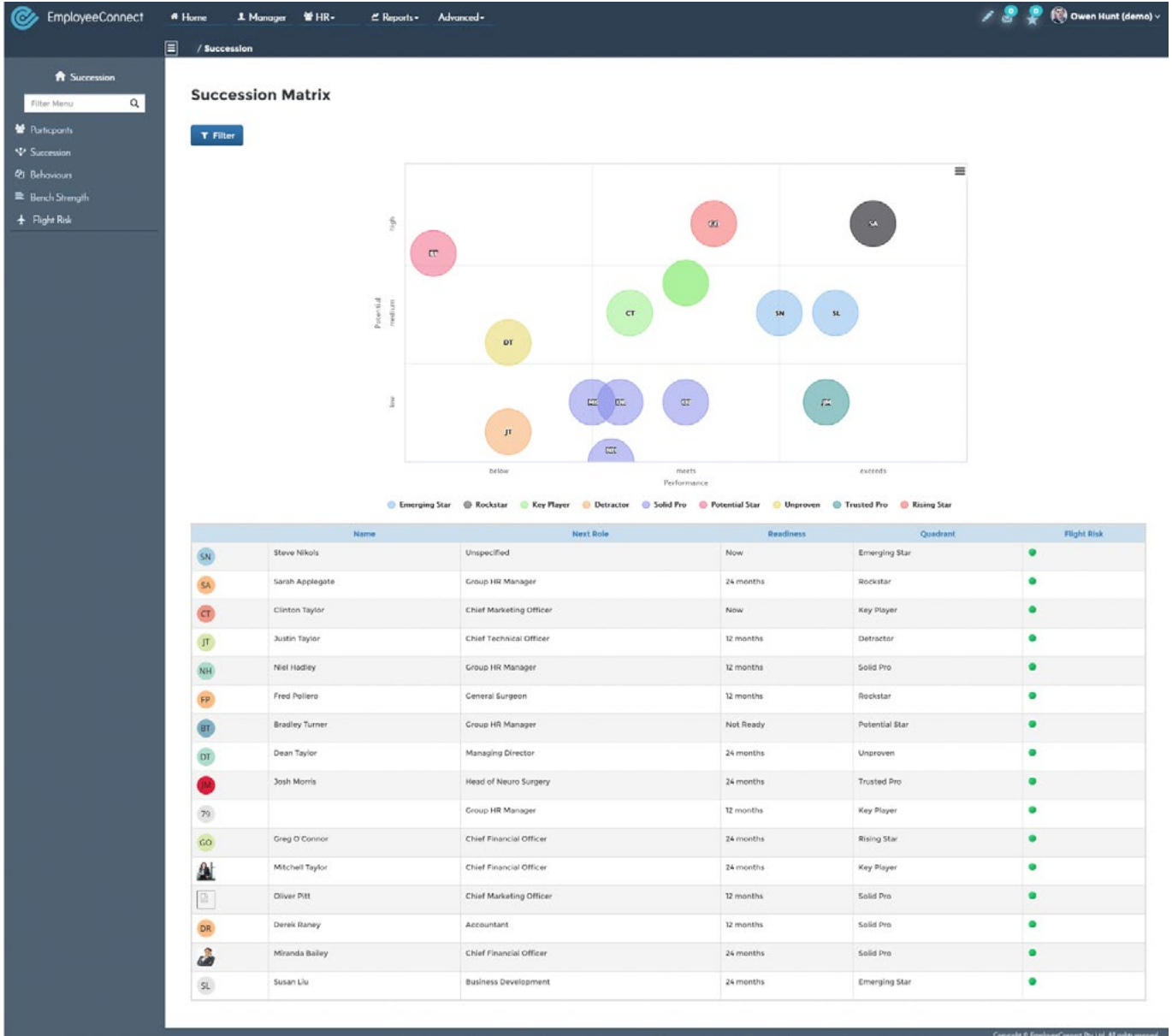
ADDRESS

Level 4/58 Riley St,
Darlinghurst NSW 2000



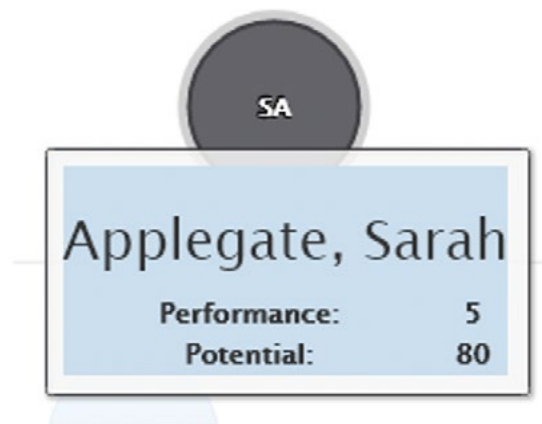
WWW.EMPLOYEECONNECT.COM

SUCCESSION MATRIX






The Succession Matrix allows you to quickly see who is most suitable for the next role. The grid above shows the name of the resource, their Performance scores (based on Performance Reviews) and their Potential based off the Succession scores. This grid can be filtered to show specific roles so you can zero into your potential role successors.

Hover over each of the Resource bubbles on the grid to see the scores of the Employees. Here is Sarah's data, seen when you hover over the grey bubble sitting on the top right grid.



This matrix allows you to determine who your top resources are, who's in between and who needs the extra push.

The table below the matrix shows you more information about the grid elements. See the sample below which outlines the Employee names, next suitable role set up for their succession plan, readiness score, what quadrant they fall under and their flight risk.

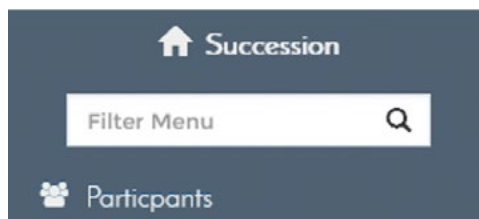
	Name	Next Role	Readiness	Quadrant	Flight Risk
SN	Steve Nikols	Unspecified	Now	Emerging Star	●
SA	Sarah Applegate	Group HR Manager	24 months	Rockstar	●
CT	Clinton Taylor	Chief Marketing Officer	Now	Key Player	●
JT	Justin Taylor	Chief Technical Officer	12 months	Detractor	●
NH	Niel Hadley	Group HR Manager	12 months	Solid Pro	●
FP	Fred Polbero	General Surgeon	12 months	Rockstar	●
BT	Bradley Turner	Group HR Manager	Not Ready	Potential Star	●
DT	Dean Taylor	Managing Director	24 months	Unproven	●
JM	Josh Morris	Head of Neuro Surgery	24 months	Trusted Pro	●
79		Group HR Manager	12 months	Key Player	●
GO	Greg O'Connor	Chief Financial Officer	24 months	Rising Star	●
	Mitchell Taylor	Chief Financial Officer	24 months	Key Player	●
	Oliver Pitt	Chief Marketing Officer	12 months	Solid Pro	●
DR	Derek Raney	Accountant	12 months	Solid Pro	●
	Miranda Bailey	Chief Financial Officer	24 months	Solid Pro	●
SL	Susan Liu	Business Development	24 months	Emerging Star	●

Name	Employee name
Next Role	Role set for the employee on their succession plan.
Readiness	How long before the employee is ready for the role.
Quadrant	Performance vs Potential.
Flight risk	How likely is the employee to leave the organisation.

HOW TO START THE SUCCESSION PLAN

1



Define the Participants by clicking on the Participants link



This brings up the Succession Participants Report. This is the report where you are able to select who is included on the succession plan.









Succession Participants												
ID	Name	Position	Key Position	Anniversary Date	Tenure	Status	Record	Manager ID	Manager	Active		
1154	Bradley Turner	GM Production	●	17/02/2017	3.77 years	⬇	●	democirus	Mitchell Taylor	●		
carsales	carsales_demo	Managing Director	●	18/08/2015	5.27 years	⊞	●	1104	Applegate, Sarah	●		
1246	Doran, Billy	GM Sales	●	11/11/2020	0.04 years	⬇	●	democirus	Mitchell Taylor	●		
1146	Fred Poliero	GM Sales	●	14/02/2017	3.78 years	⬇	●	democirus	Mitchell Taylor	●		
1201	Greg O Connor	Chief Hydration Officer	●	06/08/2020	0.30 years	⬇	●	1142	Neal Meharg	●		
1219	John Ten	Executive Assistant	●	07/01/2020	0.88 years	⬇	●	democirus	Mitchell Taylor	●		
test07	Liu, Susan	Executive Assistant	●	27/03/2016	4.67 years	⬇	●	democirus	Mitchell Taylor	●		
democirus	Mitchell Taylor	Managing Director	●	18/08/2015	5.27 years	⬇	●	democirus	Mitchell Taylor	●		
1168	Morris, Josh	GM Production	●	23/03/2017	3.68 years	⬇	●			●		
1107	Niel Hadley	GM Export	●	12/09/2016	4.20 years	⬇	●	democirus	Mitchell Taylor	●		

ID	Employee ID, Unique ID assigned in the Employeeconnect system.
Name	Employee name.
Position	Current position assignment.
Key Position	Marked Green if the position is marked as a key position, setting is seen on the position form.
Anniversary Date	Date employee joined.
Tenure	Years of service.
Status	Click this to Pause the succession plan depending on the employees state of readiness.
Record	Click this to add the employee to the succession plan.
Manager ID	Employee's Manager unique ID in EmployeeConnect.
Manager	Manager's name.
Active	Set to green if the user is active in EmployeeConnect.

2 Click the  button to add the employee to the succession plan. The button will switch to a  icon to tell you the employee was added.






Succession Participants

Search Clear Advanced xls

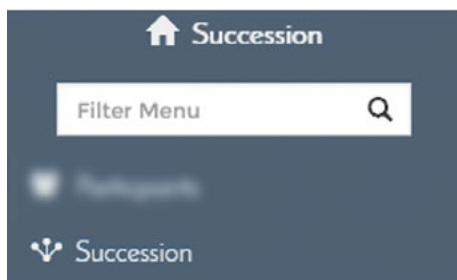
ID	Name	Position	Key Position	Grade	Anniversary Date	Tenure	Status	Record	
1154	Bradley Turner	GM Production			17/02/2017	3.77 years			dem
1219	John Ten	Executive Assistant			07/01/2020	0.88 years			dem
test07	Liu, Susan	Executive Assistant			27/03/2016	4.67 years			Click to Add

Succession Participants

Search Clear Advanced xls

ID	Name	Position	Key Position	Grade	Anniversary Date	Tenure	Status	Record	
1154	Bradley Turner	GM Production			17/02/2017	3.77 years			dem
1219	John Ten	Executive Assistant			07/01/2020	0.88 years			dem

3 Click Succession



This brings up the Employee Succession form where we can set the Employee Succession scores, view performance scores, sick leave trends and other data that will contribute to the employee succession plan and scores.


Employee Succession


Search [] Clear [] Advanced [] xls []

Refresh [] Submit []

ID	Name	Position	Months On Plan	Plan Status	Next Role	Market Demand	Readiness	Engagement	Experience	Skills	Aspiration	Learning Agility	Mobility
1154	Bradley Turner	GM Production	16	●	Group HR Manager	high	Not Ready	high	high	high	high	medium	Maybe
carsales	carsales, demo	Managing Director	12	●	Chief Technical Officer	medium	12 Months	high	high	high	high	high	No
1246	Doran, Billy	GM Sales	0	●	Group HR Manager	high	24 Months	medium	high	high	high	high	
1146	Fred Pollaro	GM Sales	16	●	General Surgeon	medium	12 Months	high	high	high	high	high	Yes
1201	Greg O Connor	Chief Hydration Officer	16	●	Chief Financial Officer	medium	24 Months	high	high	high	high	high	Yes





Quadrant	Potential	Performance Rating	Action	Compa Ratio	Trend	Flight Risk	Replacement Cost	Years Since Last Promotion	Sick Leave Trend	Manager	Active
Potential Star	70	0.3	Motivate/Reassign			27		3.77	⊖	Mitchell Taylor	●
Rising Star	80	3	Challenge/Motivate			31		5.28	⊕	Applegate, Sarah	●
	80							0.04	⊕	Mitchell Taylor	●
Rockstar	80	5	Promote			27		3.78	⊕	Mitchell Taylor	●
Rising Star	80	3.3	Challenge/Motivate			33		0.30	⊕	Neal Meharg	●
	0					41		0.88	⊖	Mitchell Taylor	●

ID	Employee's Unique ID in EmployeeConnect.
Name	Employee's name.
Position	Current position assignment.
Months on plan	How long is the employee in the succession plan.
Plan Status	Green indicates the plan is in progress, while the  icon signifies the plan is currently paused.
Next Role	Role you set for this employee on the succession plan.
Quadrant	This defines where the employee falls under based on their performance vs potential score.
Performance rating	Pulled from the employee's Performance review.
Action	Succession action derivative of his quadrant placement.
Sick Leave Trend	Click this icon to see how often the employee is on sick Leave.
Replacement Cost	How much will be the cost to replace the employee if they are to leave now.

- 4 Click the  button on the Next Role column to pick the role for the employee on this succession plan.

Select Next Role





Show 10 entries

Select	Position_ID	Position_Name
		(Clear)
	ACC	Accountant
	ACC2	Accountant
	BD	Business Development

Click on the Picker icon again to select the role.

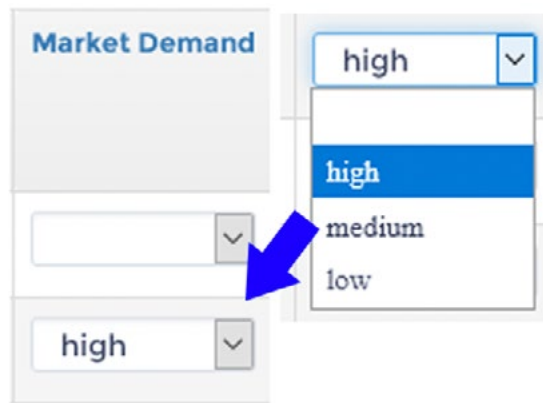
Select Next Role

Show 10 entries

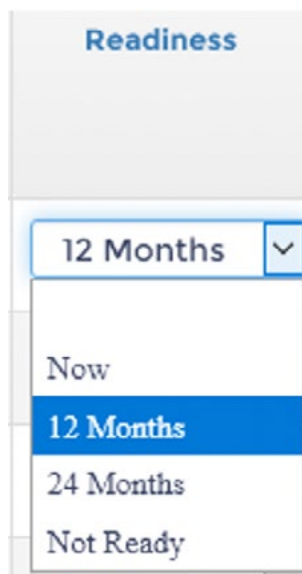
Select	Position_ID	Name
		
	ACC	Accountant
	ACC2	Accountant
	BD	Business Development

5 Set the drivers, this will power the Potential score which we will see on the matrix and the succession report.

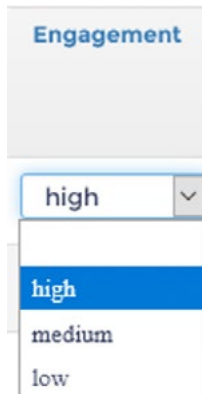
5.1 Market Demand



5.2 Readiness - how ready is the employee for the succession role?

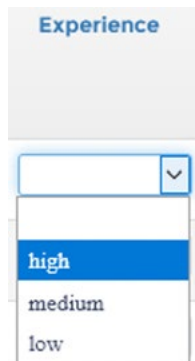


● **5.3** Engagement - how engaged, committed is the employee at work.



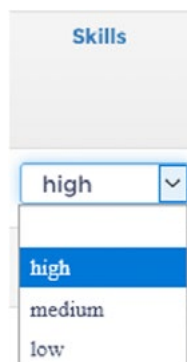
A screenshot of a dropdown menu titled "Engagement". The menu is open, showing three options: "high", "medium", and "low". The "high" option is currently selected and highlighted in blue.

● **5.4** Experience - how much experience does the employee have.



A screenshot of a dropdown menu titled "Experience". The menu is open, showing three options: "high", "medium", and "low". The "high" option is currently selected and highlighted in blue.

● **5.5** Skills - how much skills do the employee possess relevant to the role.



A screenshot of a dropdown menu titled "Skills". The menu is open, showing three options: "high", "medium", and "low". The "high" option is currently selected and highlighted in blue.

● 5.6 Aspiration - does the employee have goals, plans.

Aspiration

high

medium

low

● 5.7 Learning Agility - how much interest in learning do they have for the role.

Learning Agility

high

high

medium

low

● 5.8 Mobility - willingness to relocate.

Mobility


Yes

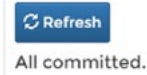
Yes

Maybe

No

6

Click the  button to commit the changes. You will be notified the changes are saved.



The Potential score will be computed and can be seen on the report when you revisit the form, see the sample below when drivers are set, the Quadrant and Potential score is displayed.

Next Role	Market Demand	Readiness	Engagement	Experience	Skills	Aspiration	Learning	Quadrant	Potential	Performance Rating	Action
									0		
Group HR Manager	high	12 Months	medium	high	high	medium	medium	Key Player	60	3	Motivate/Reward

This brings us back to the Succession Matrix. Data is set on the Succession form and is displayed on the Succession Matrix after we commit our settings.

BEHAVIOUR

Succession Matrix Behaviours



The Succession Behaviour Matrix displays the idea behind each of the Succession Quadrants. The behaviour matrix tells you exactly what each position on the grid is for. Is the employee a Performer or a detractor? Each detail is defined here with the accompanying suggested action based on how well or how poor they do on their succession drivers. This way it is easier for you to make an assessment.

In the simplest form, we want to focus on getting employees on the upper right grid where our top performers are, we can determine at a glance who amongst our bench are the best fit for the role.

Potential Star

- Delivers a low to moderate level of performance and results in current role
- Over-relies on rules and procedures; fails to identify or implement creative solutions when necessary.
- Consistently demonstrates organisational values; always operates in the best interest of the company.
- Learns and adapts quickly; applies skills and lessons learned to challenging situations.

Motivate/Reassign

Rising Star

- Delivers a moderate level of performance and results in a variety of settings and circumstances.
- Achieves results by using proven methods or practices; occasionally identifies and implements creative solutions.
- Consistently demonstrates organisational values; always operates in the best interest of the company.
- Learns and adapts quickly; applies skills and lessons learned to challenging situations.

Challenge/Motivate

Rockstar

- Delivers consistently strong performance and outstanding results in a wide variety of challenging settings and circumstances.
- Consistently uses creativity and innovation in solving problems and implementing solutions.
- Consistently demonstrates organisational values; always operates in the best interest of the company.
- Learns and adapts quickly; applies skills and lessons learned to challenging situations.

Promote

Unproven

- Delivers a low to moderate level of performance and results in assignments and responsibilities.
- Over-relies on rules and procedures; fails to identify or implement creative solutions when necessary.
- Acts in accordance with organisational values; makes decisions/takes actions that are in the best interest of the company.
- Learns and applies new skills when the job calls for it; applies lessons learned to enhance success.

Motivate/Focus

Key Player

- Delivers a moderate level of performance and results in a variety of settings and circumstances.
- Achieves results by using proven methods or practices; occasionally identifies and implements creative solutions.
- Acts in accordance with organisational values; makes decisions/takes actions that are in the best interest of the company.
- Learns and applies new skills when the job calls for it; applies lessons learned to enhance success.

Motivate/Reward

Emerging Star

- Delivers consistently strong performance and outstanding results in a wide variety of challenging settings and circumstances.
- Consistently uses creativity and innovation in solving problems and implementing solutions.
- Acts in accordance with organisational values; makes decisions/takes actions that are in the best interest of the company.
- Learns and applies new skills when the job calls for it; applies lessons learned to enhance success.

Challenge/Recognise

Detractor

- Delivers a low to moderate level of performance and results in assignments and responsibilities.
- Over-relies on rules and procedures; fails to identify or implement creative solutions when necessary.
- Does not consistently demonstrate organisational values; makes decisions/takes actions that are not always in the best interest of the company.
- Keeps current skills up-to-date, but demonstrates little effort to build new skills or apply lessons learned to increase performance.

Performance Manage

Solid Pro

- Delivers a moderate level of performance and results in a variety of settings and circumstances.
- Achieves results by using proven methods or practices; occasionally identifies and implements creative solutions.
- Does not consistently demonstrate organisational values; makes decisions/takes actions that are not always in the best interest of the company.
- Keeps current skills up-to-date, but demonstrates little effort to build new skills or apply lessons learned to increase performance.

Coach

Trusted Pro

- Delivers consistently strong performance and outstanding results in a wide variety of challenging settings and circumstances.
- Consistently uses creativity and innovation in solving problems and implementing solutions.
- Does not consistently demonstrate organisational values; makes decisions/takes actions that are not always in the best interest of the company.
- Keeps current skills up-to-date, but demonstrates little effort to build new skills or apply lessons learned to increase performance.

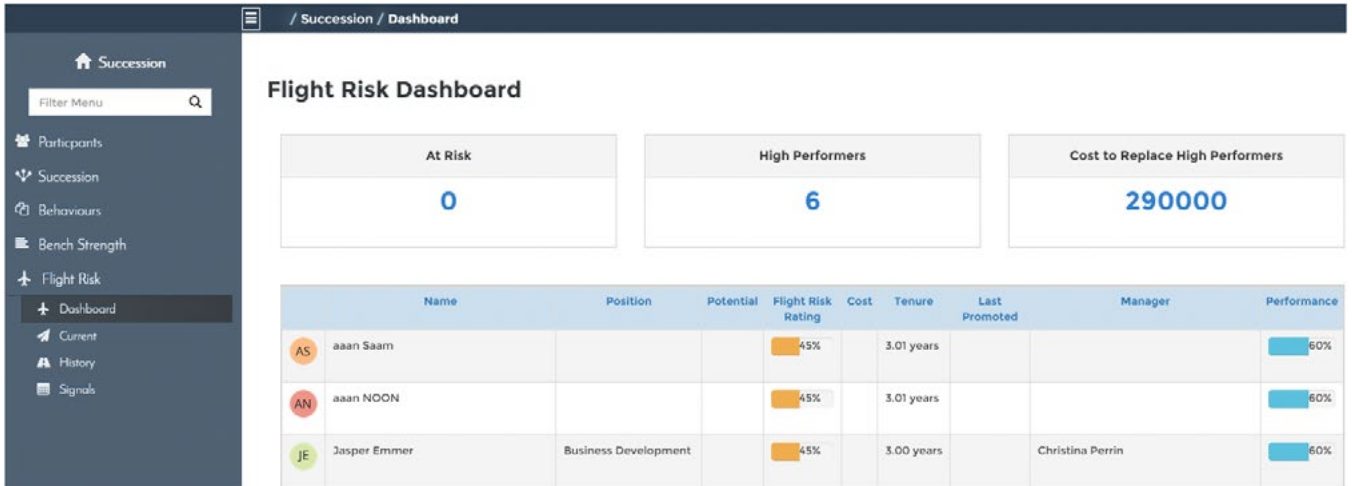
Intervene

BENCH STRENGTH

Bench Strength																
<input type="text"/> Search <input type="button" value="Clear"/> <input type="button" value="Advanced"/> <input type="button" value="xls"/>																
Position ID	Position	Incumbent	Incumbent Flight Risk	Candidates	ID	Candidate	Readiness	Time On Plan	Candidate Flight Risk	Potential	Performance Rating	Quadrant	Action	Manager ID	Manager	Active
ACC2	Accountant	Jones, Anthony	●	1	test02	Raney, Derek	12 Months	1.3461099	●	20	2.3	Solid Pro	Coach	democirrus	Mitchell Taylor	●
BD	Business Development	Baker, Kayla	●	1	test07	Liu, Susan	24 Months	1.3461099	●	50	4.6	Emerging Star	Challenge/Recognise	democirrus	Mitchell Taylor	●
CFOTW	Chief Financial Officer	Louis P	●	3	test05	Bailey, Miranda	24 Months	0.2955738	●	20	2	Solid Pro	Coach	test04	Krypkee, Barry	●

Bench Strength report shows you a report of employees you have in reserve for a particular role.

FLIGHT RISK



This report shows you who amongst your roster of employees have a chance of leaving the organisation. The report shows you different signals with weights, banding and scores. This comes together to build a picture of how likely an employee is to leave. This works in the background based on the said factors/signals and calculate the data for you.

SIGNALS

Edit	Signal	Weighting	0	1	2	3
	Length of service (years)	0.1500	> 5	>= 4 and <= 5	>= 2 and <= 3	>= 0 and <= 1
	Recruitment Source	0.1500	Internal	Referral	Agency	Advert
	Years since last promotion	0.1500	<= 1	<= 2	<= 4	> 4
	Team Turnover rate	0.1000	< 10	>= 10 and <= 20	>= 20 and <= 40	> 40
	Salary increases in tenure	0.1000	> 3	>= 2 and <= 3	1	0
	Compa ratio	0.0800	> 1.2	>= 1.0 and <= 1.2	>= 0.8 and <= 1	< 0.8
	Sick Leave Instances	0.1000	<= 2	>= 3 and <= 5	>= 6 and <= 10	> 10
	Market Demand	0.0400	none	Low	Medium	High
	Performance Score	0.0400	>= 4	3	2	<= 2
	Manager Engagement Score	0.0400	> 0.75	>= 0.5 and <= 0.75	>= 0.25 and < 0.5	< 0.25
	Employee Engagement Score	0.0400	> 0.75	>= 0.5 and <= 0.75	>= 0.25 and < 0.5	< 0.25

We have 12 signals here with weight, banding and scores that calculate and paint that whole picture of how likely the employee is to leave the organisation.

Length of service	This defines how long the employee is with the organisation.
Recruitment Source	How was the employee recruited, from where is it a referral, a from a job advertisement?
Years since the last promotion	This signal tells you how long it was since the employee's last promotion
Team Turnover Rate	Employee turnover calculation, number of leavers in a month over the number of employees in a month multiplied 100.
Salary increases in tenure	Number of salary increases given within the employee tenure.
Compa ratio	Employee's current salary divided by the current market rate as defined by the company's competitive pay policy.
Sick Leave Instances	Number of sick leaves used by the employee.
Market Demand	How popular is the position in the market.
Performance Score	Score the employee has from the performance module.
Manger Engagement Score	This signal is reflected from how well the manager engagement score is.
Employee Engagement	This signal is defined by how well the employee is committed and passionate about their jobs.

We have 3 point scores, 0 to 3. You can see the sample data below for Length of service.

0	1	2	3
> 5	≥ 4 and ≤ 5	≥ 2 and ≤ 3	≥ 0 and ≤ 1

What this means is how likely is an employee to leave when he has greater than 4 years of service? He gets a 1, this means he is less likely to leave the organisation versus an employee who has 0 or less than a year of service, which falls on 0 in this sample. So on and so forth for the rest of the signals, the system then computes the total based on the signal banding scores and displays this on the Flight Risk Dashboard giving you a report to quickly see who is at risk.

SIGNAL MATRIX, WEIGHTING AND POINT SCORES:



Signal	Weighting	0	1	2	3
Length of service	0.1500	> 5	>= 4 and <= 5	>= 2 and <= 3	>= 0 and <= 1
Recruitment Source	0.1500	Internal	Referall	Agency	Advert
Years since the last promotion	0.1300	<= 1	<= 2	<= 4	> 4
Team Turnover Rate	0.1000	< 10	>= 10 and <= 20	>= 20 and <= 40	> 40
Salary increases in tenure	0.1000	> 3	>= 2 and <= 3	1	0
Compa ratio	0.0800	> 1.2	>= 1.0 and <= 1.2	>= 0.8 and < 1	< 0.8
Sick Leave Instances	0.1000	<= 2	>= 3 and <= 5	>= 6 and <= 10	> 10
Market Demand	0.0400	none	Low	Medium	High
Performance Score	0.0400	>= 4	3	2	<= 2
Manger Engagement Score	0.0400	> 0.75	>= 0.5 and <= 0.75	>= 0.25 and < 0.5	< 0.25
Employee Engagement Score	0.0400	> 0.75	>= 0.5 and <= 0.75	>= 0.25 and < 0.5	< 0.25