

Succession Planning

Manage Risk and Ensure Business Continuity

SumTotal Succession Planning manages business risk and ensures leadership and critical role continuity across all levels of an organization.

67%

Percentage of companies that are still primarily paper-based in Succession Planning

*Source: SumTotal, State of Global People Management survey, 2010

Succession planning focuses on managing risk and ensuring continuity across all levels of the organization – risk of untimely departures of critical personnel, risk of retirees taking their skills and knowledge with them and leaving nothing behind, and risk of losing high value employees to competitors. It does so by helping your business leaders to identify top performers within the organization, create dynamic “talent pools” of this critical talent that other leaders can leverage, and prepare and develop these high performing employees for future roles.

The SumTotal Approach

SumTotal Succession Planning helps to assess organizational readiness and creates a dynamic talent pool of the most qualified individuals with the requisite skills that are best suited for the organization’s strategic needs. The system enables an organization to identify, assess, and develop talent to ensure continuity of leadership for all key positions in the organization.

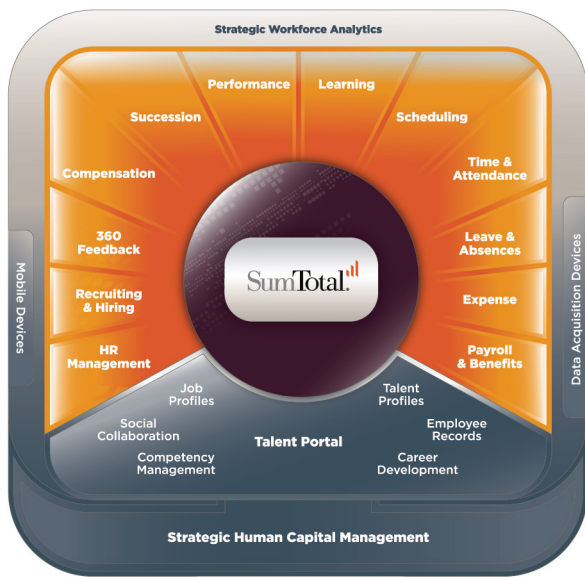
As key positions become open, SumTotal Succession Planning identifies employees who are candidates for promotion and evaluates their potential for successful placement. The system also highlights areas where a potential candidate may need reinforcement and project a timeline for readiness. Additionally, employees can indicate career aspirations and measure the differences between their current skill sets and what is needed for the future of the organization. SumTotal Succession Planning identifies potential leaders in a new organization structure, as well as skills that current leaders will need to polish or acquire.

SumTotal Succession Planning provides the following key capabilities:

- **Talent Profiles:** Capture and search for information about employee competencies, skills, certifications, and experience.
- **Talent Assessment:** Assess employees on key areas of leadership potential, job performance, and risk of leaving; Target employees for future roles.

Key Benefits

- Standardize, automate, and optimize succession planning processes and practices across the organization
- Provide senior management with global visibility into the talent pipeline and overall bench strength by leveraging dynamic talent pools and advanced analytics
- Discover talent, including high performers, deep within the organization to ensure proper retention strategies are in place
- Drive engagement by providing career paths for all employees – not just senior management, track employee development activities against talent pools
- Retain high performers, more easily hire from within, and infuse fresh ideas into the organization by promoting talent mobility
- Prepare and plan well in advance of anticipated talent shortages (e.g., baby boomer exodus from the workforce)
- Tag external job candidates (non-employees) as internal successors to broaden the talent pipeline
- Evaluate overall talent readiness and establish learning and training plans to strengthen the bench



- **Drag & Drop 9-Box:** Rate employees against potential and performance using an intuitive drag & drop interface.
- **Dynamic Talents Pools:** Group talent based on user-definable criteria (e.g., competencies); Easily search for talent.
- **Talent Explorer:** Combines talent pool functionality with advanced search capabilities to enable users to easily view and update their talent pools.
- **Talent Pool Calibration:** Extends 9-box analysis to talent pools and improves the overall usefulness and ease-of-use of talent pool management.
- **Bench Strength:** Calculate and view bench strength.

Cross-Functional Benefits

SumTotal uniquely provides native integrations from Succession Planning to other core talent processes in order to support a holistic, end-to-end talent management strategy.

- **360 Degree Feedback:** Competency reviews by peers can be used as inputs into succession gap analysis
- **Career Development:** As employees map out their career progressions, plans can be established that address competency, skill, and behavior gaps
- **Compensation:** Financial plans can be tied to future succession plans so that the financial impact can be modeled
- **Learning Management:** Learning paths and courses can be established for desired future positions
- **Performance Management:** Performance reviews can identify consistent high performers and top talent in the organization
- **Recruiting & Hiring:** Job profiles can be shared with Succession Planning; External candidates can be tagged as successors

“The [SumTotal] platform allows us to track and assess the talent pool and promote people within the company. Our latest metrics show that 75% of key openings are fulfilled by internal candidates. The succession module helps us to identify who the next senior managers could be and build development plans to help them achieve their potential.”

Debbie Hancock, Vice President of Human Resources, Seagate

About SumTotal // SumTotal Systems, Inc. is the global leader of strategic Human Capital Management (HCM) solutions that provide organizations with a new level of visibility to help make more informed business decisions and accelerate growth. Recognized by industry analysts as the most complete solution, SumTotal provides full employee lifecycle management, including a core system of record, from a single provider for improved business intelligence. The company offers customers of all sizes and industries the most flexibility and choice with multiple purchase, configuration, and deployment options. We have increased the performance of the world's largest organizations including Sony Electronics (NYSE: SNE), AstraZeneca (NYSE: AZN [ADR]; London: AZN), Amway (KUL:AMWAY), Seagate (NYSE: STX), Dell (NASDAQ:DELL), and Google (NASDAQ:GOOG).

For more information, or to request a demo, please call +1 (866) 768-6825 (US / Canada), +1 (352) 264-2800 (international) or visit www.sumtotalsystems.com

Corporate Headquarters

SumTotal Systems, Inc.
2850 NW 43rd Street
Suite #150
Gainesville, FL 32606 USA
Phone: +1 352 264 2800
Fax: +1 352 264 2801

EMEA

SumTotal Systems, UK
59-60 Thames Street
Windsor, Berkshire
United Kingdom, SL4 1TX
Phone: +44 (0) 1753 211 900
Fax: +44 (0) 1753 211 901

APAC

SumTotal Systems India Pvt. Ltd.
7th Floor Maximus Towers
Building 2B, Mind Space
Raheja IT Park, Cyberabad
Hyderabad, AP- 500081, India
Phone: +91 (0) 40 6695 0000
Fax: +91 (0) 40 2311 2727

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