



People Strategies Forum

Manage, Evolve and Thrive during the Recovery

Your Hosts



LISA JACKSON
Culture Strategist

Lisa Jackson is a culture and employee experience expert for CompTeam, as well as the founder of Corporate Culture Pros. She has advised organizations such as Merck, Schering Plough, Amgen, J&J, Neogenomics, LiveOnNY, and many others to restore performance and profitable growth during and following major change (merger, fast growth, turnaround). Lisa's speciality is showing you how culture is a performance engine and competitive advantage - to achieve true alignment and passionate commitment, from C-level to the front lines.



CHAR MILLER
Talent Management Consultant

In addition, Char founded HR with a Heart and helps individuals with career transformation. She helps organizations achieve company mission, vision, and goals with the best talent!

In 2013, Char founded RMHA, a fast-growing consulting firm that provides strategic business consulting in talent management, organizational development, performance effectiveness, human capital management, executive leadership training and development.

Char has strong HR experience as an influential, entrepreneurial and strategic thought leader designing organizational structure and framework for creating a culture of excellence, innovation, compassion, and ethics in large-scale highly matrixed healthcare, corporate, hospitality, non-profit and government organizations.



SAM REEVE
Performance Pay Strategist

Sam is the CEO and founder of CompTeam. His core focus is leading companies through transformational change by optimizing talent initiatives with reward programs to achieve long-term strategic objectives.

Sam's diverse experience includes the design and optimization of performance-driven variable compensation plans for executive, sales and core employee populations of growing companies.

Prior to founding CompTeam, Sam has worked in compensation functions of notable firms such as BlackRock, McKesson and Automatic Data Processing (ADP).

Sam is a global certified compensation consultant (CCP, GRP) with over 15 years of experience in Total Reward Strategies.

YOUR PANELISTS

Todd L Bauerle

Owner & Executive Coach, Bauerle Consulting

- Todd's focus is to help leaders achieve greater results by tapping into latent potential by applying the science and strategy of success and positive psychology to themselves and their teams.
- Todd's client results include helping individuals multiply their salary through his unique career transition curriculum and helping companies innovate to double their revenue.
- Prior to founding his own company, Todd was a leading Career and Professional Development coach for the State of Utah and an Executive Outplacement coach for Waldron HR.
- Todd has 20 years of study into the workings of the mind, psychology and career development. Todd is a certified consultant for Bob Proctor and the Proctor Gallagher Institute and graduated Summa cum Laude from Arizona State University studying Family Dynamics and Human Development.



"Success can happen faster than you think; but never faster than you believe is possible."

- Todd L Bauerle

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Lisa Jackson

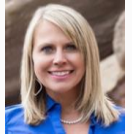


Sam Reeve

01 Succession Planning Simplified



Todd Bauerle



Char Miller

02 The New Economy: The Opportunity

03 Open Discussion and Questions

A grayscale photograph of several business professionals in suits interacting with a massive, floor-to-ceiling jigsaw puzzle. Some individuals are standing on the puzzle pieces, while others are reaching up or pointing at specific sections. The scene is dimly lit, with the primary light source coming from the text overlay, creating a dramatic and collaborative atmosphere.

Succession Planning Simplified

Preparing a New Generation of Leaders

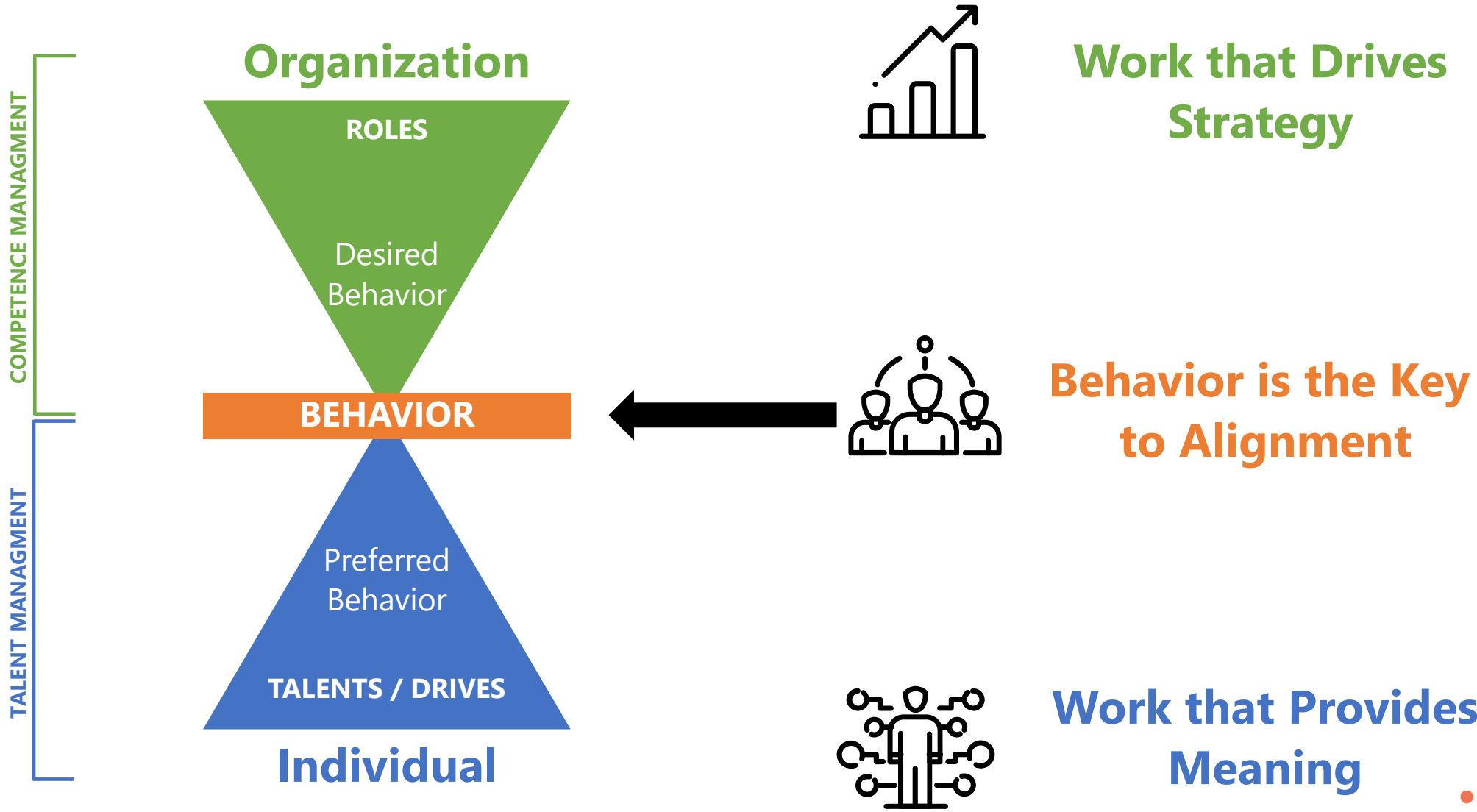
Succession Planning 101

A succession planning process:

- compiles the competencies, skills, and goals of each employee
- compares these to the needs of current and future roles
- tracks employee progress toward being ready to fill those roles.



TMA Alignment Model



A person with long hair, wearing a brown jacket and dark pants, is captured mid-jump over a large, dark, textured rock formation. The person's arms are outstretched, and their legs are spread wide in a dynamic pose. The background is a bright, hazy sky, suggesting a sunrise or sunset. The overall mood is one of adventure and overcoming challenges.

Why Important

R = Retention

E = Employee Experience

V = Vitality and Growth

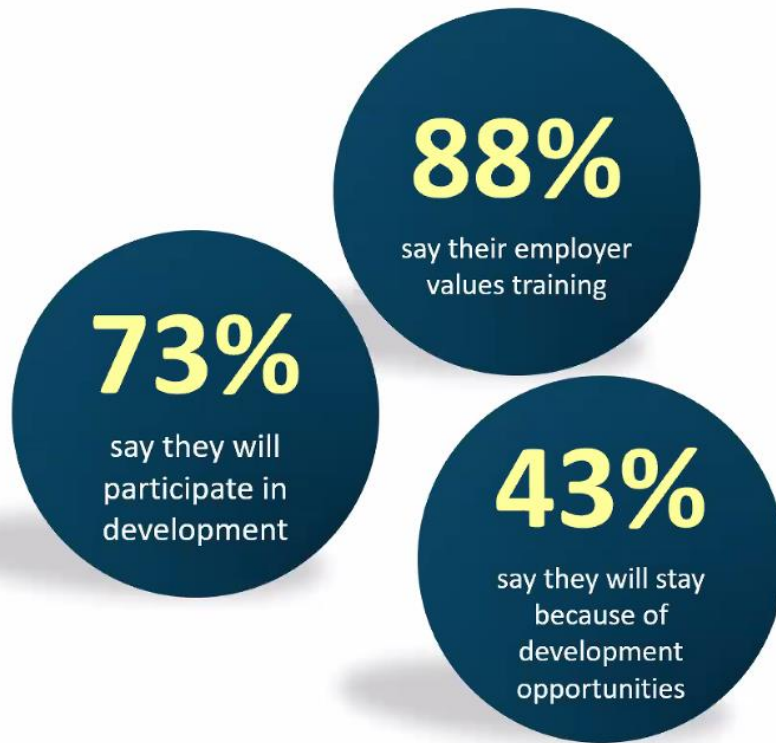
Barriers

- Complexity
- Future-Fog
- Fear of the False Promise

Leaders Role in Development

THE LATEST RESEARCH

With supervisor support...



Without supervisor support...



American Psychological Association, 2017, 1000 US adults, employed FT and PT

Succession Planning Past

- Often exists only in **large companies**
- Ignored in the **day-to-day**, versus being a compass
- **Complex** (9-box model) often feels unrelatable

Succession Planning Tomorrow

Diversity – Helping minorities thrive, grow, and lead

Fluid – Constantly grooming and developing people to be formal leaders AND informal leaders.

Multi-Track – Leadership Path + Expert Path

Flexible – Lily-Pad versus Ladder: People flow in and out, based on their life circumstances



Now What? KISS

Track Record:
Results + Likeability

Great Track Record Can They Lead? Need Coaching / Development?	High Potential Great Track Record Super Stars!
Poor Track Record Low Potential Just Say No	Great Potential, Mixed or Poor Track Record Need Training / Mentoring?

Potential: Behaviors needed yet unseen / unproven)

Elements / Steps

1. Identify a Succession Planning team.
2. Identify Crucial Capabilities for Strategic Growth: 3-5 years.
3. Create “Leadership Personas.”
4. Identify Mission-Critical Leadership Roles vs. Developmental Roles.



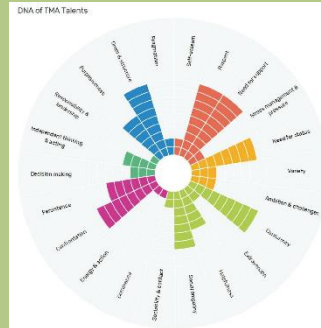
Create Personas (vs Job Roles)



Questions to Define Personas

1. What does an ideal leader in our organization look like?
2. What is the role of leadership, now and future?
3. What skills do leaders need in an increasingly virtual workplace?
4. How do we create stronger Alignment among our leadership?





First Come, First Serve Basis

*Sign up **HERE**:*

*Email **sam@compteam.net***

Contact Us

SAM REEVE, CCP, GRP

CEO & founder

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Take Action Now!





with Todd L Bauerle

The NEW ECONOMY: The **Opportunity** & the **Infinite** MINDSET

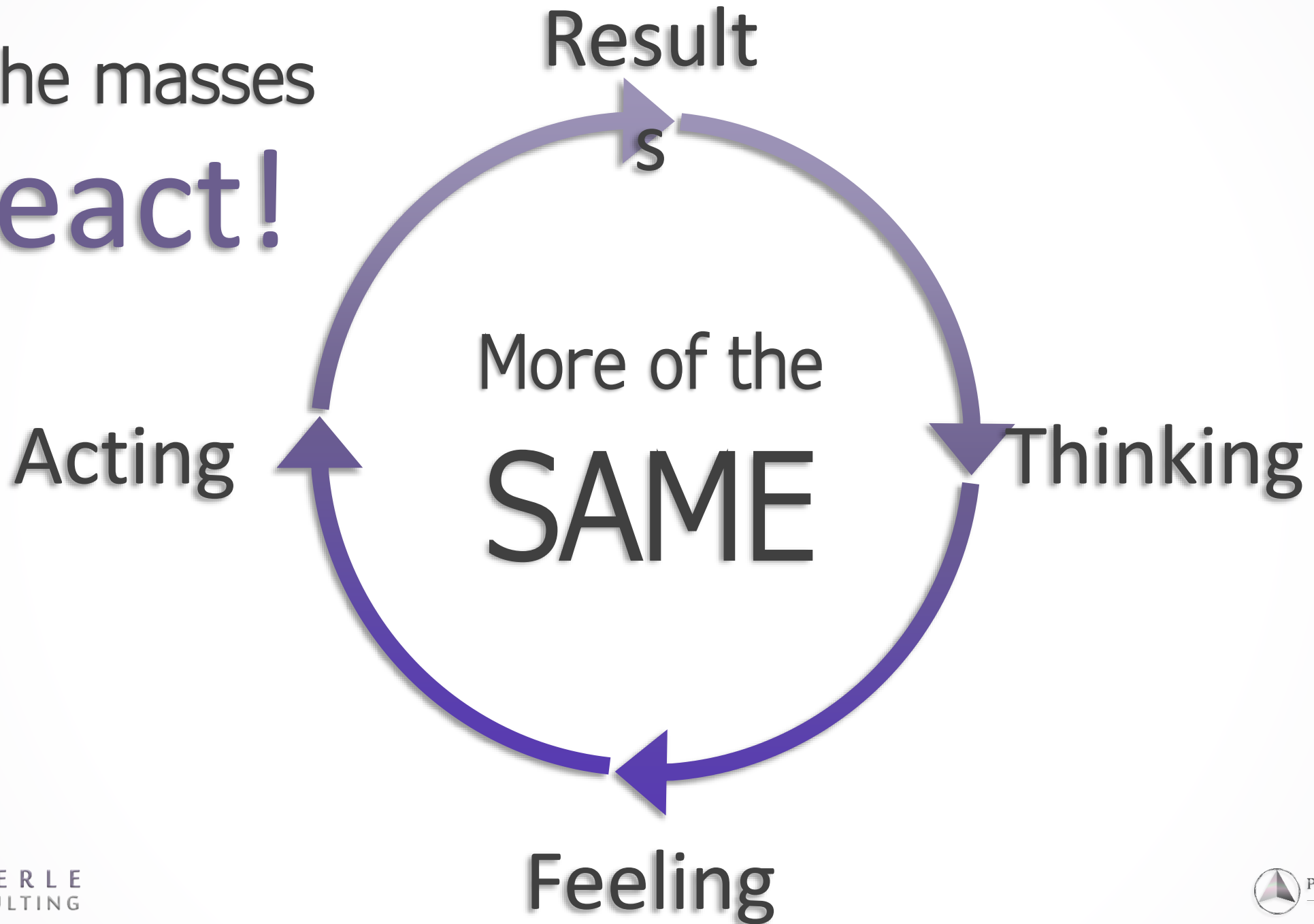
Right now,
You are probably feeling
Anxious.

It is likely the result of
thinking by default.



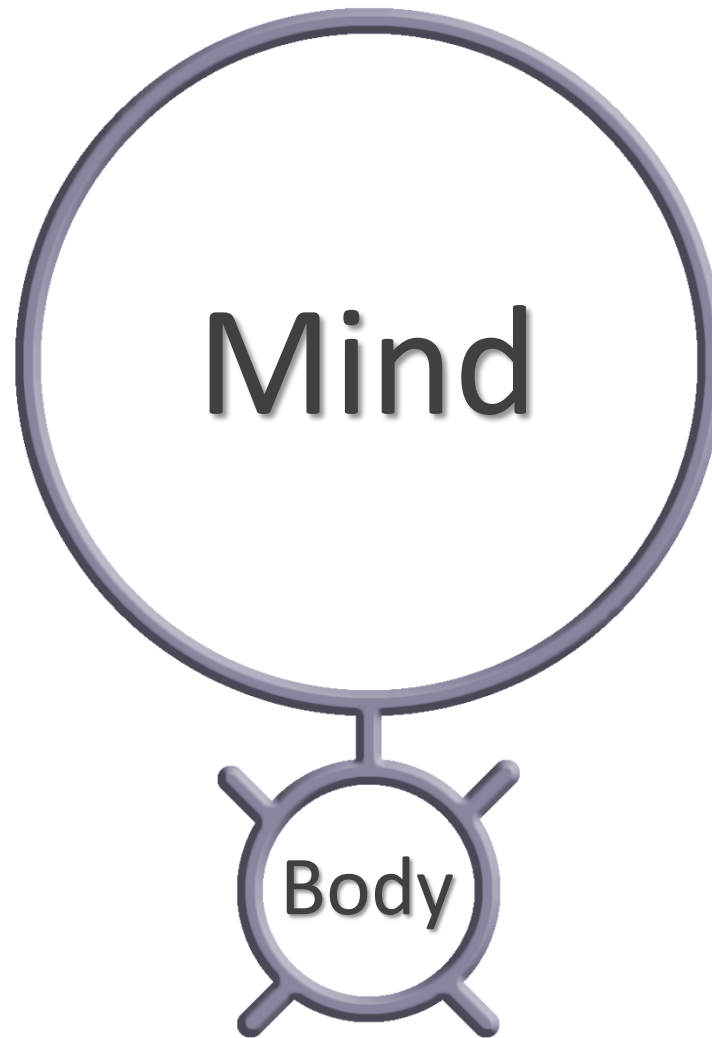
How the masses

React!

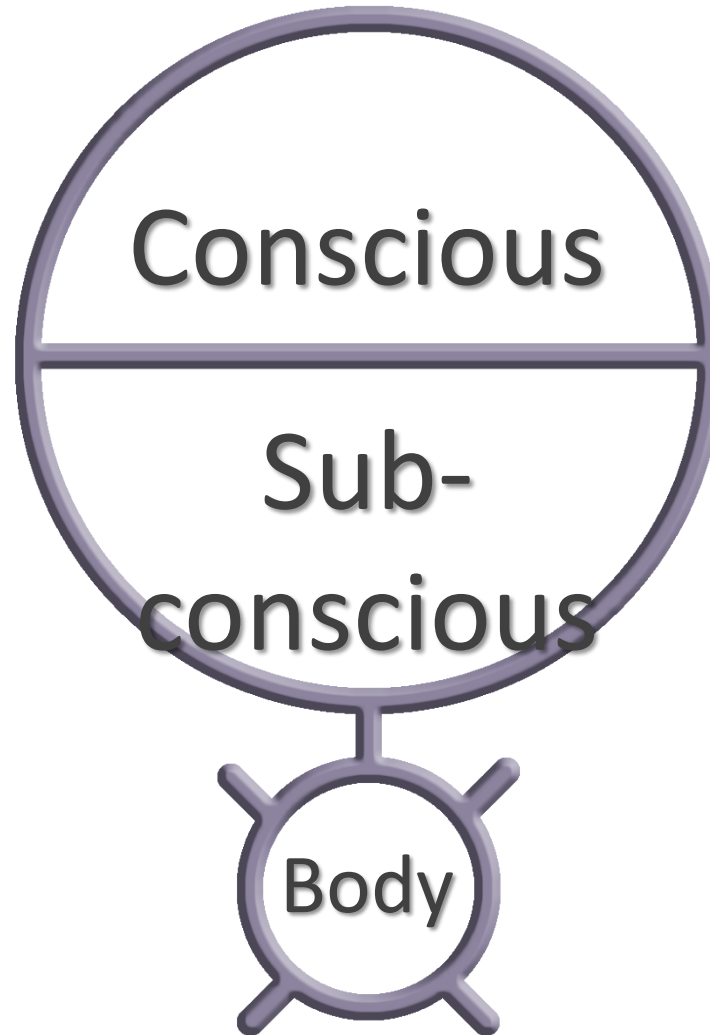
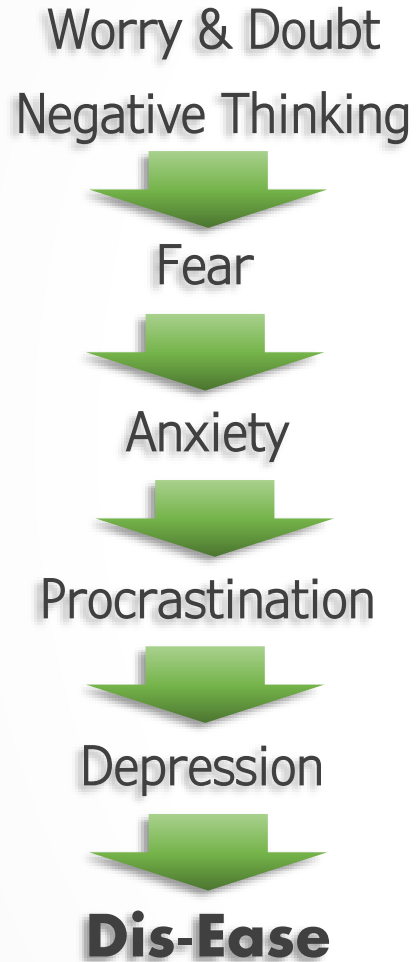




Where is your Mind-



Ignorance




This is the
finite
MINDSET

The companies that have
been investing in will and
having an infinite mindset...
will come out stronger.

Now, the opportunity is
magical!

Simon
Sinek



The background features a stylized globe in the center, composed of a network of colorful lines (blue, green, yellow, red) and dots, resembling a complex web or neural network. The globe is set against a dark blue background with a subtle pattern of light blue dots and lines.

**Success is 95%
Mindset
and only 5% Strategy**



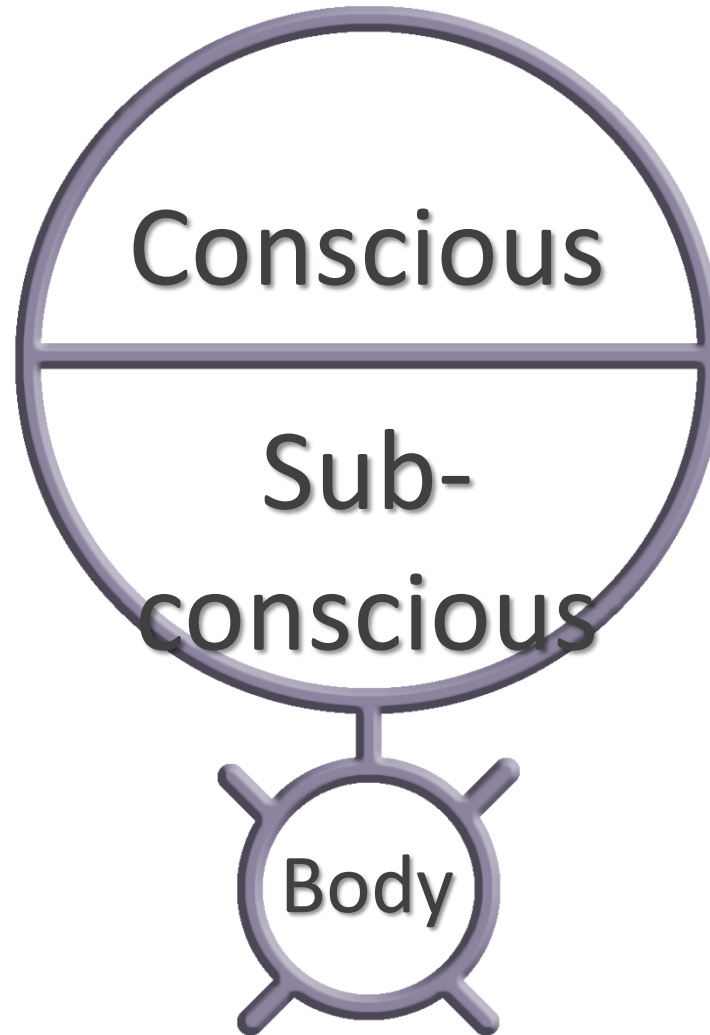
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Ignorance

This is the
Infinite
MINDSET
e



Knowledge

Study & Understanding

Positive Thinking



Faith



Well Being & Calm



Action



Acceleration

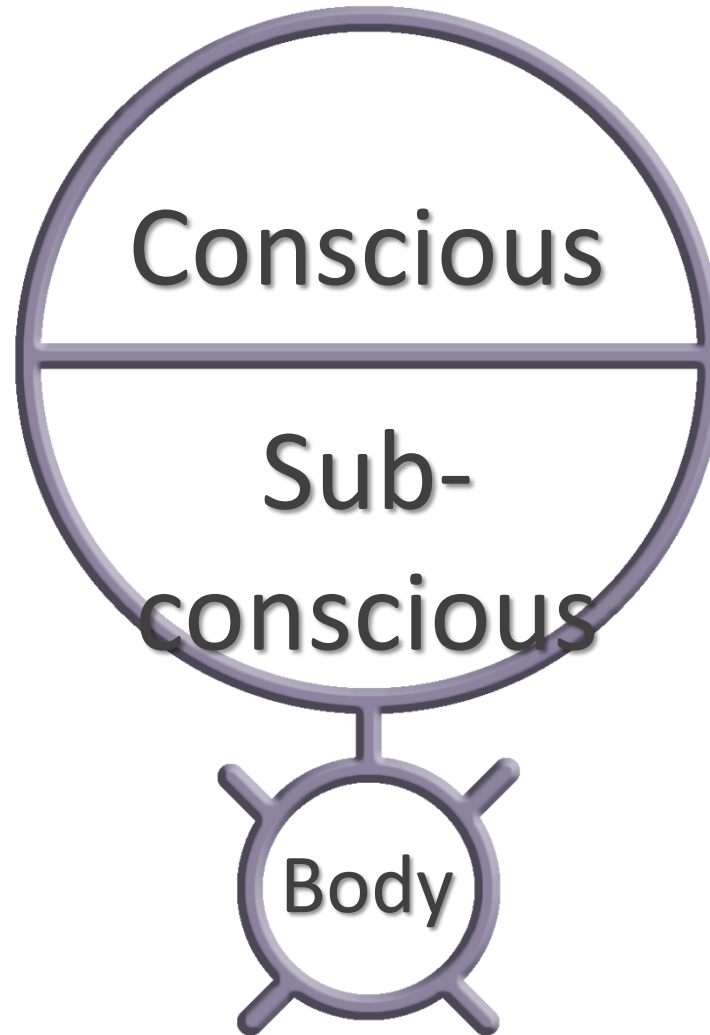


At-Ease

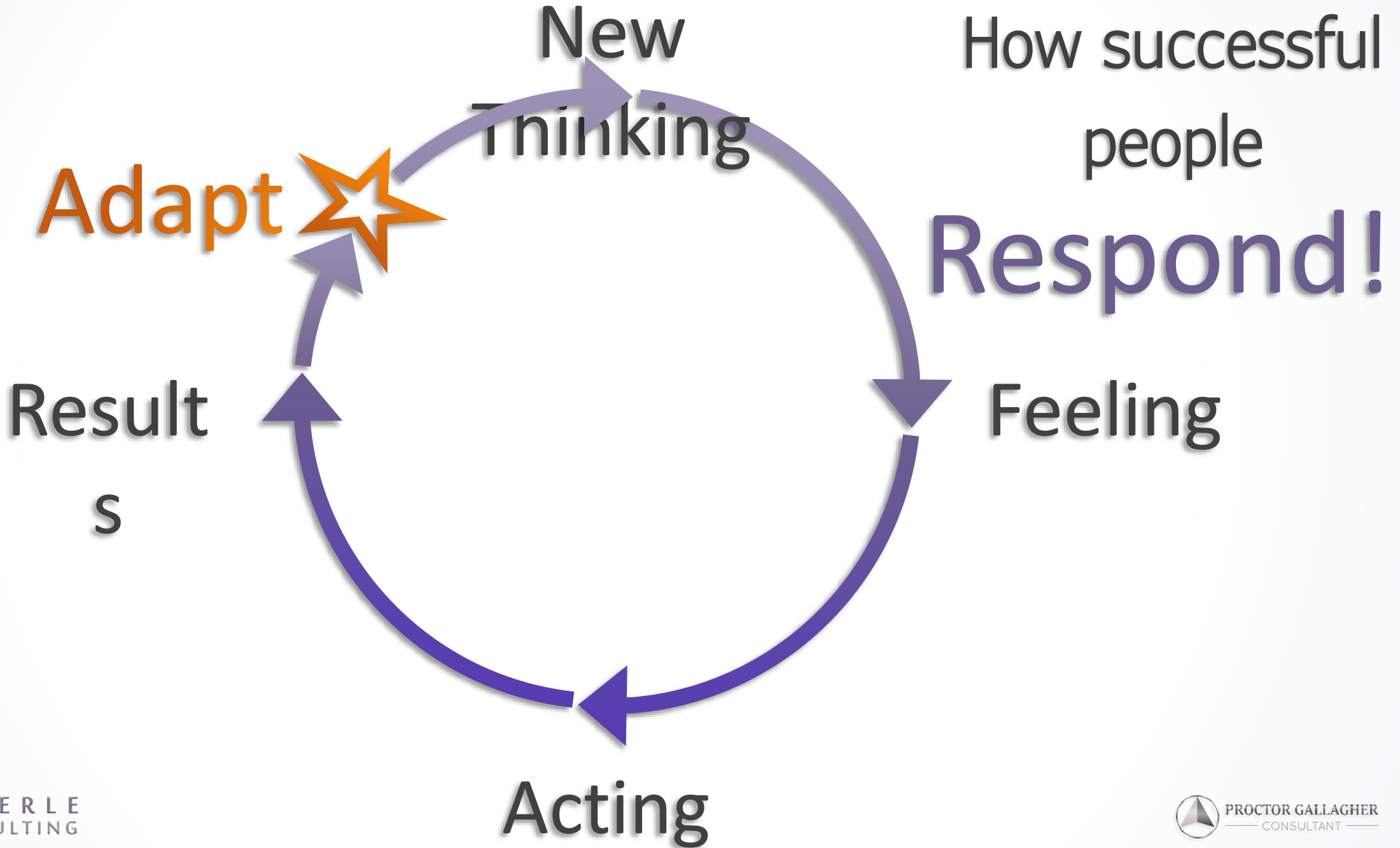
Ignorance

Knowledge

Stagnate **DIE**



Innovate **ADAPT**
e



A photograph of two people, a man and a woman, sitting on a rocky mountain peak. They are looking out over a vast landscape of mountains and a sea of clouds. The sun is rising on the right side of the image, creating a bright orange and yellow glow that illuminates the scene. The sky is a clear blue. The overall mood is one of inspiration and achievement.

What is your Vision?



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GOALS



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STUPID!

S **M** **A** **R** **T**

Specific
Measurable
Acceptable
Realistic
Time-bound

Andre w Carnegi e



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Napoleon Hill



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Henry Ford



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Thomas Edison

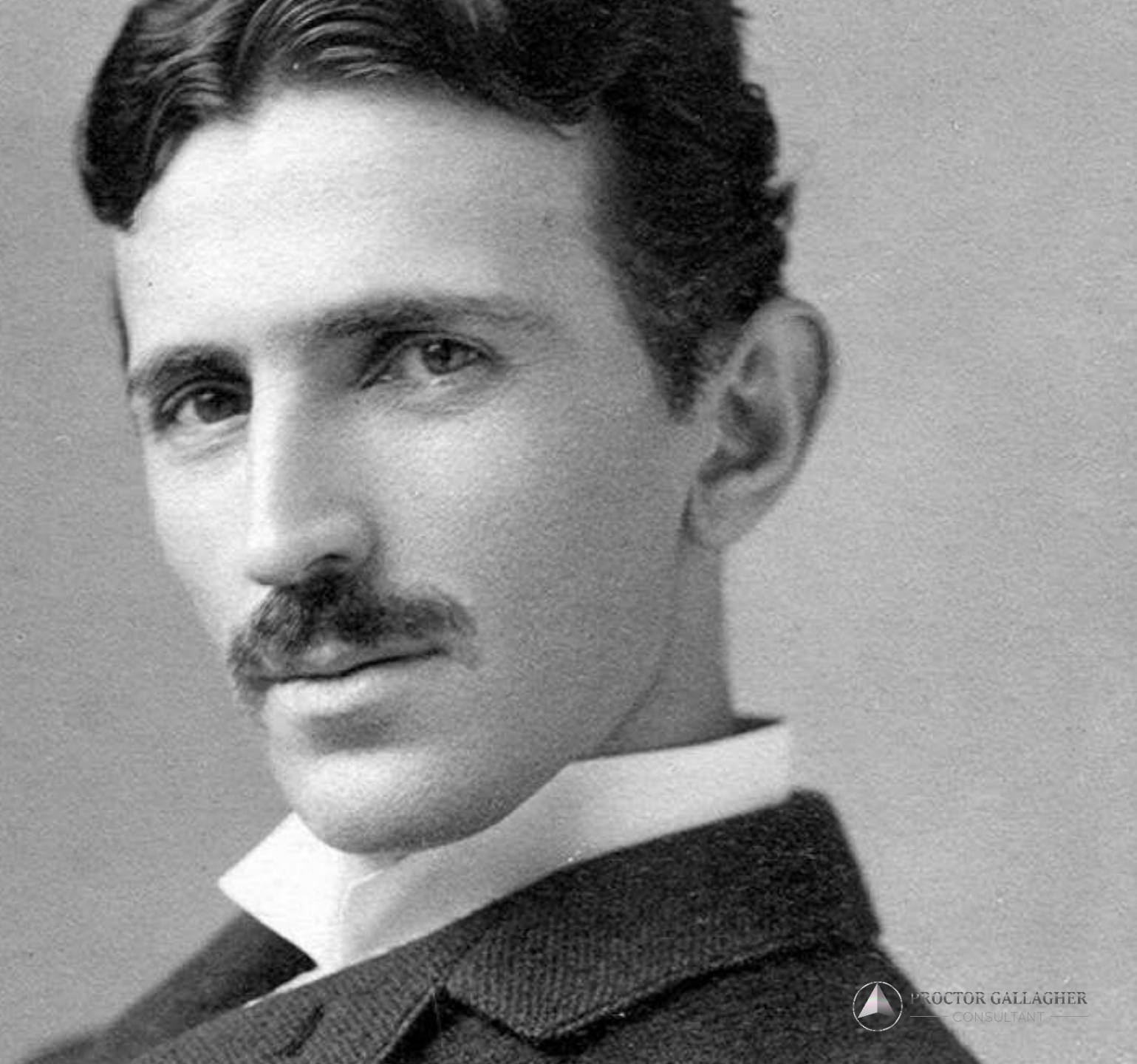


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Nikola Tesla



A black and white photograph of Earl Nightingale. He is a middle-aged man with short, dark hair, wearing thick-rimmed glasses, a dark suit jacket, a white shirt, and a striped tie. He is seated at a desk, leaning forward with his hands clasped in front of him. He is holding a pen in his right hand. On the desk to his right, there is a rotary telephone and some papers. The background shows a window with blinds and a curtain with a floral pattern.

Earl Nightingal e



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A black and white portrait of Bob Proctor, an older man with white hair and glasses, resting his chin on his hand in a thoughtful pose. He is wearing a striped button-down shirt. The background is dark.

Bob Proctor



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Steve Jobs



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Oprah Winfrey



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— COACHES —

Sara Blakely



A black and white portrait of Elon Musk, looking slightly upwards and to the right. He is wearing a dark suit, a white shirt, and a patterned tie. A bright light source is visible behind him on the left, creating a strong backlight effect.

Elon Musk



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Doing the
Impossible
is first accomplished
in the minds of the
Dreamer.



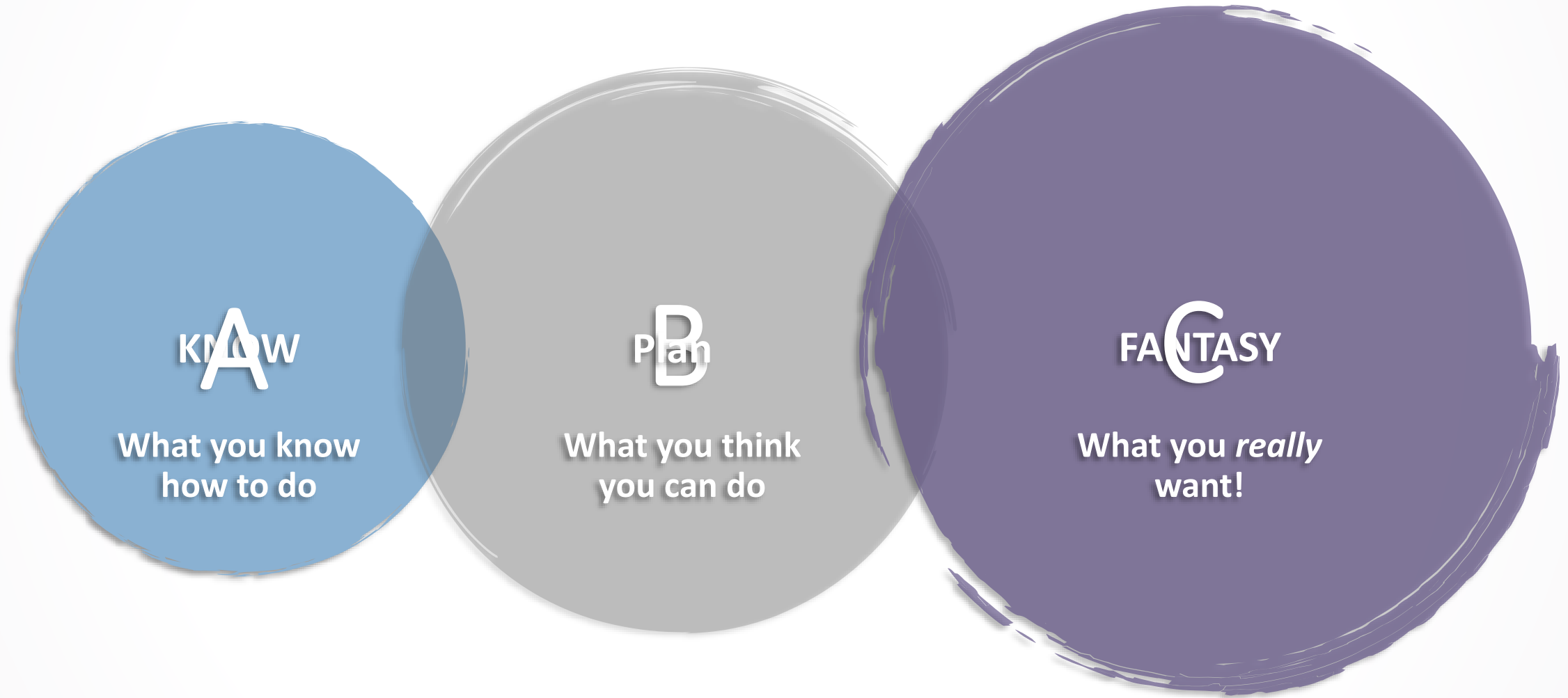
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3 Types of Goals



C

FANTASY

Beyond past results and abilities

Must be exciting and engaging

Don't know how to accomplish it

Likely is risky to attempt

Requires inspiration



Success is a Puzzle

without

Instructions!



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“If you want something you
have **never** had
You must do something you
have **never** done.”

- Thomas Jefferson



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Brainstorm

333 Method



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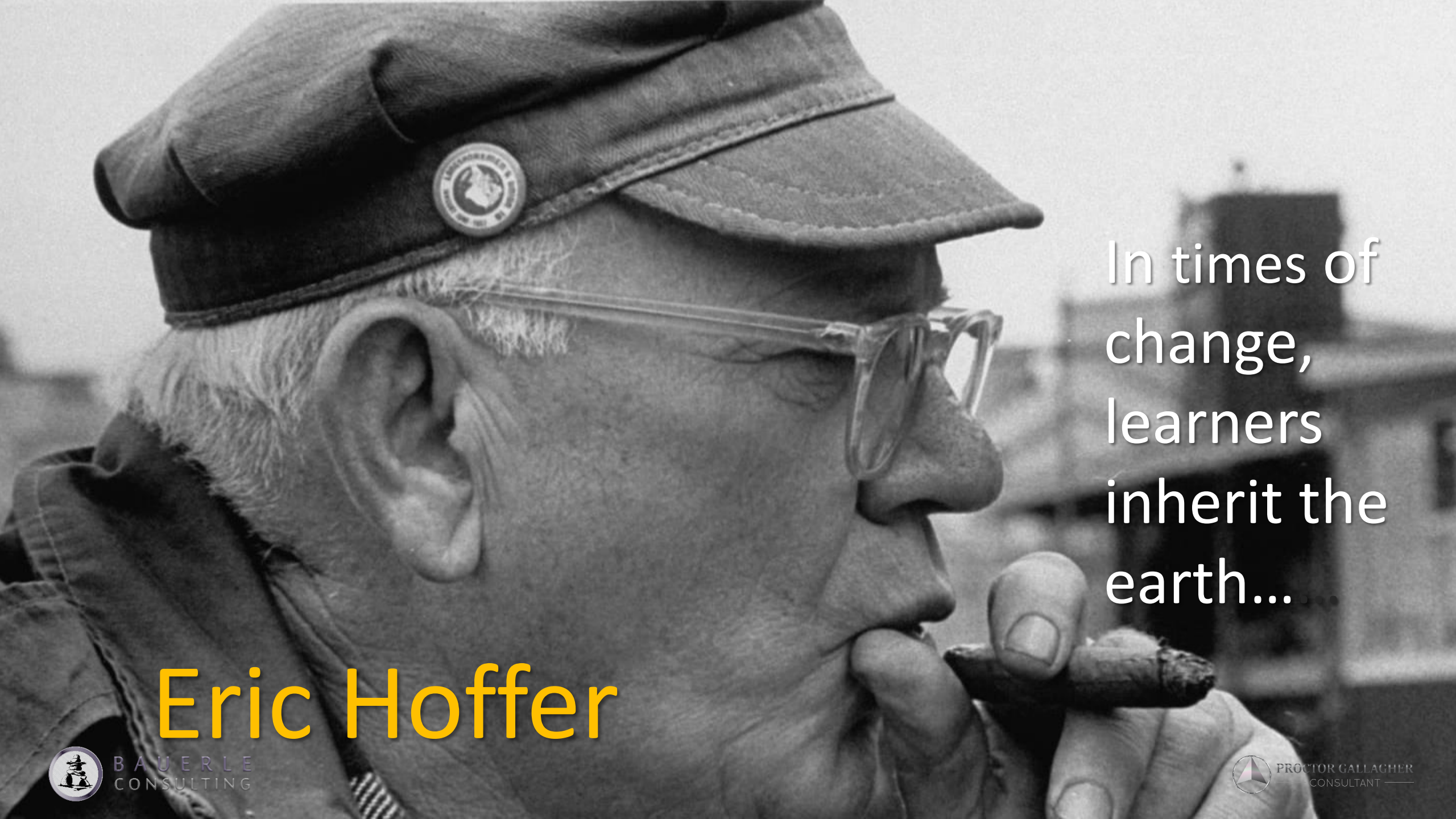


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Why we can't

How we can



A black and white photograph of Eric Hoffer in profile, facing right. He is wearing a dark flat cap with a circular badge on the side, glasses, and a dark jacket. He is holding a cigar in his right hand, which is near his mouth. The background is blurred, showing what appears to be a cityscape.

In times of
change,
learners
inherit the
earth.....

Eric Hoffer



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A black and white photograph of an elderly man, Eric Hoffer, in profile. He is wearing a dark flat cap with a circular badge on the side, glasses, and a dark jacket. He is holding a cigar in his right hand, with smoke visible. The background is blurred, suggesting an outdoor setting.

While the
learned find
themselves
beautifully
equipped for
a world that
no longer
exists.

Eric Hoffer



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You never change
things by fighting
the existing
reality.

You build a new
model that
makes the old
one obsolete.

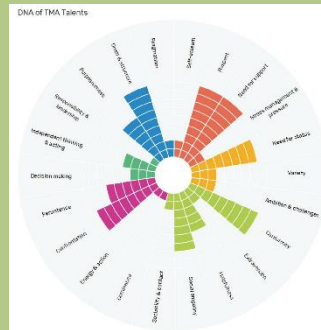
Buckminster



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First Come, First Serve Basis

*Sign up **HERE:***

Email sam@compteam.net

Contact Us

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 **Take Action Now!**

