



Conation: A Successful Model for Succession

Adding the conative dimension to succession planning broadens the potential for successfully promoting from within an organization. It also provides the unique advantage of identifying career paths for individual employees that are based upon the highest and best use of their innate abilities.

Conation has historically been known as the *modus operandi* (MO), or an individual's consistent, predictable pattern of taking purposeful action. Conative strengths are a person's natural methods of creative problem solving, making decisions and striving toward goals, and are proven to be unbiased by gender, age, national origin or race.

Every enterprise can improve the probability of growing future leaders by identifying the ways its employees will predictably add value if placed in appropriate roles. Understanding the conative makeup and purposefully using the talents of high potentials will improve workforce loyalty and retention, and ensure the right people are in the right place at the right time for the long-term benefit of both the organization and the people within it.

In addition to measuring an individual's instinctive, innate talents for achieving goals, the culture of the organization can also be assessed to define its conative characteristics. An organization's conative culture will have specific tendencies that influence how actions are taken and decisions are made. The specific tendencies of a conative culture can include being:

- research based
- service oriented
- innovation driven
- quality centered

Conative assessments, known as the Kolbe Indexes, identify which of these cultures exist and how they will be affected by various options in a succession plan. Not only can management now have a way to describe the current culture in actionable terms, but using the identifiers in conative reports can help the succession team predict the leadership talents that will be necessary for the future of the enterprise.

A conative succession model compares the conative traits of potential successors with the functional requirements of the position as well as the expectations of those who currently hold the job. Analytical software examines the existing conative culture in which each role operates, and projects future obstacles and opportunities for success. This approach also identifies specific MOs seen as necessary by those evaluating future needs at every level in the organization.

The process of incorporating conative assessments into succession planning has proven beneficial in a wide variety of enterprises because it broadens the candidate pool beyond just those who have had the opportunity to gain specific skills and experiences. It also avoids discriminating against any part of the population, and focuses attention on the actions people will and won't take – and whether those are the actions necessary in a particular job or on a specific team.

Example 1: A Fortune 500 corporation

Challenge: Board members of a Fortune 500 corporation described its leadership team as burnt out and unable to deal with marketplace changes. It had gone from an innovative conative culture to a has-been in its field. In an effort to shake things up, management offered a buyout plan to anyone in the three top levels of the organization who chose to leave. Far more people took advantage of the generous offer than was anticipated, which disrupted succession plans that were in place. Time was of the essence. The board sought solutions for finding “a new breed of management – people more open to change.” The initial plan was to recruit outside the organization to make this happen ASAP.

Process: Kolbe Corp analyzed the conative strengths of those who chose to leave the organization and those who remained. The process identified the conative talents of all currently available personnel in the top three levels of management.

Findings: Those who had taken advantage of the buyout were found to be a natural group of innovators. In-depth interviews by independent consultants found that many of those leaving planned to start their own entrepreneurial businesses. The generous severance offered by the corporation gave them the incentive to make the move. “This is my chance to be free to be me,” was the typical explanation. They complained that the bureaucracy of the corporation had kept them from using their innovative strengths in their past positions and that had contributed to burn out, stress and feeling undervalued.

Conative results of the potential successors who decided to stay showed there were few with the natural inclination to be innovative or embrace change. While these candidates had been identified in the original succession plan as viable candidates, the problem the corporation was trying to fix would have been magnified by promoting research-oriented executives into power when what the organization needed was an innovative leadership team who embraced change.

Solutions: Recognizing the unintended consequence of the buyout program led the corporation to consider injecting needed conative strengths not from the outside, as with its previous succession planning practices, but from within the organization. Kolbe recommended going beyond the pool of people meeting the criteria of having the right skills and experiences to identifying employees with the right conative strengths — who could acquire the necessary experience. The conative-based process was able to identify these high-potential candidates and create a succession plan for in-house people to fill the three top teams over a reasonable period. Women and minorities were more equally represented than in comparable positions in similar organizations.

Within 18 months, the process of building succession plans based upon conative strengths was instituted through every level and most divisions in the organization.

Results: Short-term, the company’s stock took a beating, but as the top team was regenerated with the right mix of natural abilities, it pulled out of trouble. Over the next five years of implementing the conative approach, the company dealt well with market changes and remained highly profitable against rapidly growing competition. Those placed through the conative matrix helped form a long-term culture of innovation. Twelve years later, the corporation remains a leader in a rapidly changing field.

Example 2: A large Midwestern manufacturing company

Challenge: Over a third of the senior management group of this enterprise was nearing retirement age and there was concern about the exodus creating a leadership void. The desire was to promote from within, with identification of appropriate successors being left to each department and division head. The risk was a lack of cohesive planning required to develop a strong team as opposed to a group of individuals vying for power.

Process: Kolbe began identifying the conative characteristics necessary for the next generation of leaders. In many cases, great differences were identified between the strengths of current job holders and those of potential successors. It was clear the presumed successors' talents did not match the future conative needs of the organization. The data provided the foundation for redefining job descriptions, future needs, and opened new possibilities for current employees.

Findings: This particular leadership group was likely to remain in place for 5 years. Assessment results found this group was neither quality-centered nor service-oriented – both shown to be highly desirable cultures in the evaluation process. The executive team was an unclear mish-mash of conflicting conative styles who were unlikely to work well together. The MOs of probable candidates for the vacant positions added to the problem.

Solutions: The conative assessments and forecasting software identified a pool of previously overlooked employees to fill key roles. Additionally, the process helped match mentors with high potentials which helped to speed the learning curve. Using this process to identify candidates, match talents with job requirements and mentor high potentials resulted in the placement of a far more viable leadership team.

Results: This process led to a quantifiable succession plan that has since been used with success by the company for over ten years. It has helped recruit the right internal people, who not only have the necessary natural abilities to fill future spots, but who want to stay with a company that values who they are and what they will be able to contribute.

Example 3: Family-held business

Challenge: A “Mom-and-Pop” enterprise had grown nicely into a regional niche in the Northwest US. The founding couple decided it was time to turn the business over to the next generation, which they had tried to groom for this day. They had brought in an outside General Manager to pave the way, but he disagreed with their succession plan.

“No way are the kids ready to take over,” the GM told the founders. According to him, the eldest son, who was the assumptive CEO, was too glib and didn't make practical decisions based upon company experience. The daughter, who was the Chief Accountant, seemed bored and uncommitted to the day-to-day tasks. And the youngest son was labeled by the GM as a goof-off and a troublemaker.

Process: Taking a conative approach led to identifying the natural strengths of each of the three offspring without gender or age stereotyping or building on family or company myths. Their Kolbe Index results shed light on the GM's conclusions, and identified the roles which would help each succeed and the company grow.

Findings: The subsequent analysis revealed it was in fact the daughter who had the natural strengths to be the CEO of this company. Yet because those strengths were not being utilized in her role in Accounting, she was indeed bored and uninterested in staying involved. She had never been considered for the job that suited her so well because, her parents admitted, they had thought of her in what to them was “a role for a girl.”

Their eldest son had the ability to become their company's best salesperson and promoter, and never saw himself as being a good CEO. He dreaded the burden his parents' expectations had put on him, which was clear from his perceived requirements of that job.

Was the youngest son truly a goof-off? Not when he was dealing with mechanical issues, like managing the company's collection of racing cars and certainly not when he was driving one of them. But for the financially minded parents, these activities did not relate to the core business, just to the fun they had with a regional brand recognition project.

Solutions: Changing the parents' long-held succession plans took time. With numerous analytical and diagnostic reports laid out in front of them, and non-judgmental discussions led by conative experts, the truths were apparent. Within a few weeks, their plans were made public:

The daughter was to become the CEO; the eldest son was immediately named to a new position of Executive Vice President of Marketing and Sales, and the younger son was set free from the business to go out and build the company-sponsored racing team into a professional competitor.

Results: This next generation used the same conative process throughout most of the organization. Within a year, the parents were enjoying full retirement. Within three years, the "kids" had doubled company revenues. Fifteen years later, the company is thriving as a nationally recognized brand, with the sister-and-brother team still going strong.