

LESSONS LEARNED | BY GERSON ROSENBLOOM

The Planned Departure

I've often said that you don't completely know an employee until they leave your company. Even staff that seem fantastic at their job sometimes do so by covering their own tracks. I don't mean this in some sort of sinister way — sometimes it's just the work style of the person in question. Some people document everything, while others keep it all committed to memory. Although the latter method may work well while the person is there, clearly it blows up when they leave.

Through my years of having folks work for me, it has been a rare treat to have someone so organized and efficient that their successor could just walk in and understand everything about what needed to be done. In short, that just about never happens. My default was to assume that the person leaving just wasn't as good as I thought they were.

I figured that there were wrinkles to their performance that I had missed that got amplified by their absence.

SUCCESSFUL TRANSITIONS

The lesson learned came when I took on a somewhat unique role in my current job. In my eight years at Sweetwater, I've held six different positions. Because of this, I've become something of an expert at driving successful transitions.

As a matter of personal pride, I feel like it's my responsibility to ensure that the person who takes over the position that I'm vacating has all of the support needed to succeed. Consequently, as soon as I start in a new position, my mindset is to document everything I do.

I approach every task with the idea of doing it my very best, but also structuring each duty in a way that the next person will have an equal measure of success.

For instance, instead of posting appointments on a calendar, they are part of a CRM.

This way, the appointment is documented and so is every conversation that led up to it, as well as details of the meeting and the required follow-up. Every policy created or changed gets a memo written and filed for future reference. Every teaching opportunity is likewise documented.

In short, I conduct myself as if I could be moved out of the position at any time. In my mind, no matter how successful I've been doing what I do, the ultimate measure of my accomplishment is the success of my successor.

PLANNING FOR THE FUTURE

What I've come to realize is that, back in the days of running my own company, I failed myself and my employees by not realizing that it was my responsibility to create a culture where people are expected to prepare for a time when they're no longer there.

Whether their departure is a planned career change or an unexpected bus in an intersection, sooner or later, just about everyone leaves. Don't get me wrong, I certainly always stressed the importance of the handoff when someone gave their notice. But the right time to prepare for that transition is early in an employee's tenure.

As soon as they hit that juncture where they know what they are doing in the job, then it is imperative to stress that part of their responsibility is to be sure that they're not indispensable.

This may be counterintuitive since you know that many employees try to protect their turf by making it seem like you can't get along without them. But it's your job to help them understand that part of their assessment is based on how well documented their position is and how well they have planned for the future.

Perhaps you need to stress advancement only comes once it's easy to put someone else in their current position. **MI**

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