

Providing Vision and
Leadership for the Future
of the HVAC and
Sheet Metal Industry

BEST PRACTICES FOR FIELD LEADER SUCCESSION

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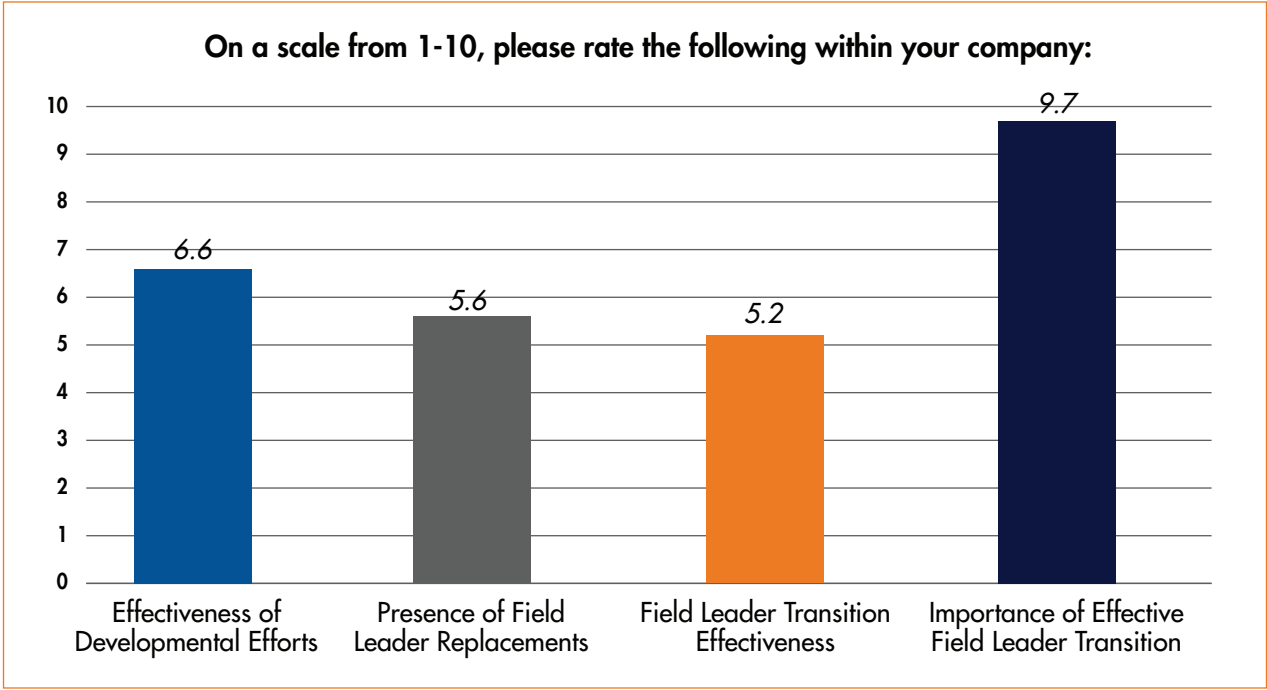
EXECUTIVE SUMMARY

Truly enduring organizations, those that survive economic rollercoasters, fierce competition, and shifting industry landscapes, are rare. Major demographic shifts in the workplace, like the retirement of Baby Boomers underway now, or a wave of leadership transitions, can also put the continuity of a business to the test. In responding to this challenge, businesses in our industry have focused much of their time and energy on developing executive-level succession plans.

The most forward-thinking firms have spared no expense to ensure their next generation executive leaders are well-prepared to carry the company forward by the time they step into their new roles. According to FMI’s 2017 OTMS survey, 71% of respondents indicated they had a formal plan for executive succession. This effort is necessary, as a leadership transition at any level is a gradual process that presents its own set of complexities. And, while organizations have recognized the necessity of properly planned executive-level transition, the same level of focus has not been spent on field leader succession, despite equal levels of urgency. Insufficient attention to field leadership succession can be as equally risky for a business as neglecting executive succession planning. After all, the field is the closest touchpoint our

companies have to our customers and drive the success of our revenue-creating projects. However, poor field execution represents the greatest risk to our projects and exposes our companies to potentially significant margin erosion. It is imperative that we have strong field leadership in place to effectively navigate the challenges and demands our teams in the field face daily. Planning effectively for field succession could arguably have the single biggest impact on long-term company reputation, client satisfaction, and the number of repeat clients. No organization will be able to endure long-term without a plan to successfully prepare the next generation of leaders at the field level.

This white paper is the culmination of research listening to leaders across various positions, diverse companies, and varied geographies, as we searched for the industry’s best practices for accelerating field leaders’ development to solve for the succession challenges in the field. Perhaps not surprisingly, we found that there is no “silver bullet” for developing field leaders to address the urgent succession issue in the field. Many companies we interviewed leveraged one or more of the best practices we outline in this paper, but very few demonstrated all these best practices consistently and intentionally. Those who intentionally leveraged these best practices, however, created a culture of developing field leaders and have turned it into a competitive advantage.



This white paper uses survey data from over 170 respondents, representing more than 70 companies, and 32 interviews¹ to answer the question: How can we accelerate the development of field leaders to effectively transition to the next generation? Our survey respondents clearly sensed the importance of this question yet did not indicate that there exists a clearly effective process within their current organizations.

From our results, we identified common challenges our industry is facing related to field leader succession as well as best practices relating to identifying, developing, transitioning, and retaining the men and women who will be your next leaders in the field. By adapting these best practices to your company's culture, you too can successfully develop your field leaders to ensure stronger continuity in your business.

FIELD SUCCESSION CHALLENGES

One key question that we asked ourselves in conducting this research was: Why is field leadership development and succession frequently underprioritized despite an urgent need in our industry? Our interviews and survey findings indicated that under-prioritization of field succession is likely a function of many obstacles and challenges. To do this well requires intentional time and effort, although it is all too easy to instead focus on other urgent issues facing the business. Delaying the process of field succession, however, will ultimately add significant risk to the long-term health of your business. In the following section, we outline some of the most common challenges in more detail.

“Finding the Time”

Not surprisingly, the biggest challenge facing the industry regarding field leader succession is time; leaders have limited time to prepare the next generation to take on their roles. According to the survey respondents, on average, 28% of field leaders, will retire within the next 5 years. Furthermore,

27% of respondents indicated that 40% or more of their field leaders will retire within 5 years. These are startling numbers and suggest most organizations in the industry would do well to have a clear field leader succession plan in place.

“I probably have about 70% of my foreman who are going to retire within 5 years. I mean, that’s the biggest issue I see..... This company could be hurting if I can’t develop guys to be good foreman.”
– Superintendent

Clearly, the need to accelerate the development of the next generation of field leaders is essential. The learning curve to develop field leaders is steep; there is much to absorb and master before a smooth transition can be made. Even more concerning, there appears a noticeable gap in age and experience between the current generation of field leaders and the leaders groomed to replace them. Of our respondents, 57% of leaders agree there is a noticeable age gap between them and their potential successors. This means that instead, field leaders who have decades of experience and industry connections, are being replaced with newer leaders who are still developing the fundamentals.

What makes the increase in demand for field leadership development so daunting is the time it takes to properly facilitate a smooth transition from one generation to the next. The learning curve for current field leaders is steep and finding time to develop is difficult. Many field leaders cited heavy work schedules and job demands as primary barriers for being able to spend intentional time developing the next generation. This often results in current leaders developing future leaders “when they have time”, which rarely ever happens in our fast-paced industry. We routinely see development left on the backburner while leaders are fighting fires and meeting deadlines. This practice can delay development of next generation leaders for months and sometimes years.

¹ For complete demographic information on our survey and interview respondents, see [Appendix A](#)

“[Participating in training] is at the willingness of those individuals. Most of the time its during work hours, and they would rather be working and doing their job. We have a few guys that want additional training, but we don’t force it on them because they are under enough pressure to complete their jobs on time.”

– Senior Leader

For fear of disrupting day-to-day operations, many organizations take a hands-off approach to field leader development and prefer to allow the knowledge and relationship transfer to happen organically through a “sink or swim mentality”. This has been the historical approach to field leader development in the industry and severely limits an organization’s ability to have strong field leaders ready to step into positions of increased responsibility.

“I don’t believe there is enough time spent with the individuals to show them everything. It’s more of getting thrown in the swimming pool and see if you can swim. That’s how I was brought up, so unfortunately I kind of expect that from a lot of guys.”

– Foreman

Investment

The next major obstacle most companies cited was the monetary investment and opportunity cost for training the next generation of leaders. As we know, an hour of labor can be very expensive, not to mention the opportunity cost of taking leaders off the jobsite. The time pressures of delivering a job on-time combined with the monetary burden can be enough to dissuade some companies from investing in field leadership development. However, if talent development and building the next generation of field leaders is truly a priority, then forward-thinking executives should view the short-term investment of time and money for development not as an “extra credit” opportunity for leaders, but as a regular part of their everyday jobs. This challenge of finding the resources when delivering

work on razor-thin margins is not lost on us. However, we see that our “best in class” companies found ways to continually invest in their next generation and culturally support the importance of such training at the highest level. The companies that truly buy into a culture of talent development and have made it a competitive advantage do not see leadership development as “extra”, they see it as an essential cost of doing business.

Respect from Field Veterans

One notable challenge for young leaders becoming equipped to take on new senior field leadership roles is for a young leader to transition from being a friend and peer to ascending to a position of authority and having to earn the respect of older direct reports. Gaining the respect of seasoned field leaders can be tough, especially given the perceived importance of experience and tenure in our industry. Some veteran field workers may have even mentored or shown the ropes to new field leaders, thus observing past mistakes that might lead to a distrust to the new leaders fully knowing what they are doing.

“Easily the #1 challenge was that I was kind of young and a lot of the old-timers didn’t want to listen to me. Getting the older folks to see your worth was really challenging. Some of them have the attitude that they know more because they have been around longer, so why should I listen to this guy.”

– Foreman

Many younger leaders have expressed the difficulties in leading those who are older and more experienced than them. While this can be done (and is done every day throughout the industry), it is certainly a challenge to win the respect of field veterans.

Adjusting to Additional and New Responsibilities

Several leaders indicated that a big challenge was adjusting to the additional demands of a senior field

leadership role. The idea of being held accountable for producing results through others or working longer days may not be for everyone. Hence, we recommend that leaders identify future leaders who show a propensity to go above and beyond, take additional responsibility when the need is there, and demonstrate the willingness to learn and coach others. A big challenge for many field leaders is knowing how to drive results through others and being less hands-on. As many leaders echoed throughout our interviews, just because someone is a good individual contributor does not necessarily mean they will be a great field leader. Part of the struggle is knowing what competencies to look for in up-and-coming field leaders. Although things like adjusting to the paperwork and technology tools were mentioned, most field leaders found it difficult to step out of the minutia and instead lead from a ten-thousand-foot view.

“The tasks at hand are different from being boots on the ground to managing people. There wasn’t a clearly defined process of what my additional responsibilities were.”
– Project Manager

BEST PRACTICES IN ACCELERATING FIELD LEADERSHIP DEVELOPMENT

In our study, it became clear that the challenges facing field leaders and businesses in accelerating the development of field leaders is real, however, are not insurmountable. Several notable best practices were identified in speaking with leaders in the industry. We have organized these best practices in three broad sections: (1) **identifying your future field leaders**, (2) **building your bench of field leaders** and (3) **transitioning your field leaders in new roles**. While not all of the outlined best practices may apply to your business or culture, we encourage you to consider them all seriously and resist the urge to say too quickly: “yes, we already do that well.” Take a good, hard look at your field leader development practices, talk to your employees, and look at the results. Are you executing these best practices as effectively as you could be?

Are you maximizing your time and energy in the right places? Are there field development practices which could be more aligned to your culture?

Section 1: Identifying Future Field Leaders

Developing a Field Succession Mindset

If you are going to build a culture of developing field leaders, all of your field leaders need to understand that it is an essential part of their job to identify and develop their eventual successor, or even better, multiple successors, to create a strong pipeline of future leaders! Unfortunately, one of the challenges we identified is that some leaders not only view developing their successors as “extra work,” but also may view young, ambitious leaders as a threat to their potential advancement.

“Nobody wants to see someone succeed more than them because they see a risk in them taking their position. There is a disconnect between the worker and the project manager. If the foreman doesn’t give good feedback on his workers, it’s hard for them to progress up. The foremen don’t want to see good workers become foremen because they are scared of losing their position. In the end, if you are the foreman you should want guys to succeed because you can step up to a PM, but guys don’t see it that way. As a worker, that’s one of the toughest things that I experienced.”
– Foreman

Clearing this first hurdle requires a mindset shift and can be addressed simply by the way your organization frames the conversation around talent development. Make sure every field leader understands why developing their successor is crucial if they want to advance their own career. A strong leadership pipeline, contrary to what some believe, contributes directly to the career advancement of all the leaders in an organization. Without someone to backfill their role, the opportunity for advancement may be stunted if the void left by the current field leader would cause too much of a dip in performance to risk. This seems

obvious to many executives, but do the leaders in the field know this? Based on our conversations, this concept does not seem to be widely understood by current field leaders. There is often a competitive culture at the field level, which can make supporting and developing people more challenging.

Defining Competencies of a Star Field Leader

Of the leaders we connected with, those who excelled in field leader succession were clear in what competencies separated a great field leader from an average one in their respective business. Here, a project manager underscores the importance of spotting strong potential in field leaders.

“When we do see those traits, we try to latch onto them early. We have a lady in estimating who is just a machine and we hired her as a sophomore [in college]. We told her, ‘As many hours as you want to work per week, we would love to have you’. For a company as small as we are, we are very forward looking in identifying talent early on.”
– Project Manager

So, what “competencies” are indicative of great field leadership? Interestingly, according to our study, technical skill ranked at the very bottom of what field leaders need to be successful. Understanding the technical side of the job is important, but rarely ever a major differentiator between average and great field leaders.

“We always put good guys as foremen, but when those guys are no longer installing the work, they just have to oversee. He may have the skillset to be great at installing the work, but that doesn’t mean he is able to lead.”
– Superintendent

It is important to note that leadership competencies must fit within your specific company culture to make them practical and useful. While there may be overlapping competencies from organization to organization, it is important to find the necessary

competencies that are aligned with your broader strategy, business goals, and align with your core values. Before subscribing to those we list below, explore what competencies are needed from your field leaders. Ask your senior leaders in and out of the field, “Beyond technical knowledge, what separates a great field leader from an average one?”

When we asked this question, we received a wide range of answers. However, there were a few common themes that emerged which seem to serve as a strong foundation for successful field leadership.

1. **Communication:** Overwhelmingly, the most successful field leaders were viewed as strong communicators. Balancing a variety of stakeholders on the jobsite, whether that be supervisors, labor, other contractors, or the client, takes clear, fluid communication to keep everyone updated and satisfied. Good communication, however, goes beyond simply drafting clear emails or keeping everyone on the same page. Part of good communication, according to many of our interviewees, involves being able to listen. Listening helps field leaders know how to manage each individual stakeholder. It allows them to understand each individual: what motivates them, what their past was like, what they are passionate about, and how they prefer to be led. All too often, field leaders adopt a “my way or the highway” mentality that doesn’t work for most people anymore. When looking for your next field leaders, look for gifted communicators who are also very strong listeners.

“Communication first and foremost. Being able to verbalize exactly what they expect from you. You may be talking to a kid fresh out of high school, so you need to make sure they understand exactly what you mean.”
– Foreman

2. **Interpersonal Influence:** This competency speaks to the ability to build and maintain relationships. While listening helps build a

strong foundation for the relationship, the ability to strengthen and maintain these relationships will be a key component to the success of a young field leader. It's well known that construction is a relationship-based business, thus, it makes sense to have strong relationship builders leading your field teams, as they are the closest touchpoint to your clients and create your company reputation. It will be hard to generate repeat work or satisfy a client when the field leader is difficult to work with. Furthermore, a leader who is not skilled at building relationships will struggle to get the buy-in of his team and other contractors on the job.

“The relationship they have with their team is something I look for in good field leadership. Are they leaning on their team and offering support or are they driving the team into the ground and leading through fear?”

– Senior Leader

3. **Organization & Planning Skills:** Another critical competency for field leaders is the ability to stay organized and forecast the materials and labor they will need. This speaks to the difficulty in transitioning from an individual contributor, where you show up, have the tools you need (hopefully), and focus on doing your job well, into an individual now leading a team, where you are responsible for performance, getting them the tools, getting them the materials they need, and setting the schedule. It requires an individual who does not live focused only on the day-to-day but looks out 2-4 weeks in advance and can see the big picture. Many new leaders struggle with keeping track of the paperwork, reporting, and forecasting, so having someone who has organization & planning skills will make this transition easier.

“They aren’t just looking at this task that they have right now and then wondering what’s next..... they have that natural thought process that they are already thinking ahead. I would say most people just aren’t wired that way.”

– Senior Leader

4. **Inquisitive:** Leaders who are inquisitive are those who have an open mind, are not afraid to ask questions, and can see how the whole project fits together rather than just their portion. Individuals who ask questions are more likely to learn and continuously improve throughout their career. This continuous learning, in most cases, will allow them to eventually solve problems on their own and work more autonomously with minimal oversight, which can improve productivity and keep things on schedule. They can look at plans and drawings and spot potential obstacles, as well as make it easier to work with other contractors by understanding how their portion fits within the entire project.

“Particularly with young guys, lots of them are hesitant to ask questions because they don’t want to seem like they are unprepared or incapable of doing it. So instead of asking they just continue to spin their wheels and figure it out through trial and error which is not profitable or efficient in any way.”

– Senior Leader

5. **Other Notable Competencies:** The top 4 competencies were clear, but there were several other traits that stood out during our interviews. Other competencies receiving notable mention were decision-making, team oriented, accountable, humility, and time management. A strong work ethic was overwhelmingly mentioned; however, we would argue that a strong work ethic is table stakes to be considered for a field leader position. The most effective competencies are

differentiators that separate star players from the average player. They should be unique and help candidates stand out. We would hope that if someone is being considered for a field leader role, they would already possess a strong work ethic before even being considered for additional positions.

Once you have identified what you are looking for in a leader, the hard work begins: you now must go out and find them! Many organizations have had success by first identifying young future field leaders early, followed by creating a clear pathway for advancement while also clearly communicating that to them, and lastly to keeping them in the organization. Because each business is unique in terms of recruiting methods and resources, we have focused on a few practical tips as they relate to growing future field leaders within the business.

Leveraging Internships and Creating Career Pathways

One best practice to find talent early is to create or leverage an existing internship program. Internships serve as a low risk opportunity to connect with prospective employees early in their career, allow them to get exposure to the industry, and work on developing their skillset. This may not be an option for every organization, but for those who can find different ways for the intern to learn and test their communication skills, organization, planning, and interpersonal skills, it is a highly effective way to assess and identify talent early. This approach treats the interns as potential future full-time employees and actively works to help develop those skillsets.

For those who are not able to utilize internships, ensure that you create a clear pathway for advancement that you can show and communicate to the next generation leaders you identify. It's important that future leaders see there are opportunities in your business and understand the expectations to take each next step. The most driven young employees will want to see what opportunities are available for them to advance their career and see that the organization is committed to investing in their development. Many of our

interviewees cited their company's willingness to invest in them and provide advancement opportunities as a key reason they have been loyal for so long.

"If they are looking at me and thinking that I'm worth sending to training and paying me at my scale, you are investing in me. You are making me feel included in this company. You want to hear my opinions and hear from ME. Now, what I want to do is give that back to you 10-fold because now I feel like I am a part of something."

– Superintendent

Of course, communicating future opportunities alone will not breed loyalty with your next generation leaders. You must demonstrate to them that you are investing in their personal and professional development, backing up those words with action. Once you have identified what you are looking for in your field leaders and have built a pipeline of future leaders, the real work of continuing to build future field leaders begins.

Section 2: Building Your Bench of Field Leaders

Most veteran field leaders would agree that development in our industry comes, in large part, through opportunistic on-the-job learning over the course of multiple years. This is primarily because it is difficult in such a fast-paced industry to pull someone off a jobsite and pay for their labor while they are being trained or developed. Despite these obstacles, it is critically important to create a culture of talent development where developmental opportunities are woven into the fabric of how your business operates. In this section, we will outline several best practices to build a stronger bench of future field leaders.

Field Leader Development Program

To begin, companies who have successfully built a culture of developing field leaders have had resounding success with creating an internal development program specifically for field leaders. These field leader

development programs (FLDPs) not only provide a clear pathway for advancement, but also offer exposure to various aspects of the business and deep leadership learning. In this section, we outline a few essential components of successful FLDPs that surfaced during our research.

“We have a program within our organization that identifies candidates from the bottom level out of college. It allows them to dip into each side of our organization [preconstruction, project management and field supervision]. Each person spends approximately 9 months within each aspect of the business, and from there they can choose which direction they want to go..... I’ve seen 100% success rate coming out of our rotational development program. I don’t see a whole lot of gaps.”

– Superintendent

FLDP Component #1: Variety in Work Experience

One question frequently explored in our interviews was, “How long does the process of field leader development usually take?” Answers to this question were all over the board. The most common timeframe stated was 3-5 years. However, respondents stressed that readiness cannot be truly measured in terms of a timetable but is better measured in terms of type of experience. One of the main benefits of a FLDP is that it can be structured in a way that gives the leader rotational experience to see all aspects of the job. If the leader can see not only how work get installed in the field, but also experience how a project manager and shop foreman see the job, they will have a better perspective of how all the pieces of every project fit together and be able to see the big picture when they are leading a job in the future. Being able to work with superintendents, foremen, project managers, and even executives will provide valuable insight and experience to help candidates not only see how the business operates from all angles, but also allow them to set a direction for their own careers. Field leaders consistently identified this as a more effective method to gain experience than remaining on the same project

in one role for extended periods of time. Breadth in experiences is critical to developing field leaders who are able to understand the big picture complexities of putting work in place.

“When they identified me as a candidate, they allowed me to rotate around and wear some different hats. It gave me the opportunity to change my scenery a little bit and that really helped me grow.”

– Foreman

Another benefit of a rotational experience is that next generation leaders have the benefit of working with multiple mentors and get exposure to a variety of leadership styles. Rather than having a single mentor in one position throughout the whole project, the participant can see what works well from various leaders within the organization and organically blend those ideas and best practices in with their own style. A best practice for this type of rotational program is to have one designated “coach”, usually a director of operations or more senior, experienced position, to check in and oversee the process to make sure the participant is getting the development they need. These check-in discussions can be monthly and cover things such as lessons learned, what they have seen work well, and areas of improvement they have identified. It is a great way for executives to follow the participant through the program and oversee their development while simultaneously giving the participant a chance to get exposure to multiple levels of the business. Giving the participant the shorter-term, rotational experience in a variety of roles under multiple leaders, will produce quicker development than one long-term project in a single role.

FLDP Component #2: Intentional Development Opportunities

Beyond the rotational job experience, these types of programs can offer some unique development opportunities. While some knowledge and experience will be absorbed organically as the participant moves through the program, it is also critical that each participant obtains hands-on learning, wrestles with

common project challenges, and learns from challenges in a low-risk environment. Below are a few tangible methods for developing future field leaders more intentionally.

An easy first step to providing additional development opportunities is to invite the participant to sit in on field leader meetings and/or calls that most laborers are exposed to. Whether this includes field leader meetings, operations team touchpoints, or even calls with high level project executives, any exposure the participant can get will prove valuable in the long run.

“We start giving them that meeting exposure when they are younger. Pull-planning meetings are an example..... if you can get them involved in those aspects it helps. Most people don’t know what to expect in those and it takes them a while to understand what’s going on. If you get them in early, it will help them be successful on their projects.”
– Superintendent

Being able to sit in on these meetings and learn what items are discussed, how to prepare, and expectations of various stakeholders, will make these meetings less daunting for new field leaders because they are the ones that will be ultimately accountable for the meeting action items. This will also help shape their understanding of the larger project scope and understand the “why” behind certain decisions and expectations that are pushed to the field. In turn, understanding where these decisions come from will help the leaders communicate them to the field and help to motivate and inspire their crews to action.

Another good development opportunity is to have the participant compose 2-week lookaheads each week for labor schedules, supplies, and tools needed on the job. Weekly, they can provide their lookaheads to their mentor and have the mentor check for accuracy or challenge their thinking. This is a great developmental exercise that helps the participant think critically about forecasting and planning for the job at hand. This exercise can make for an impactful weekly discussion if mentors make this a point of emphasis. For best results, resist the urge to simply give a “yes” or a “no”

response to their lookahead. Instead, ask questions that challenge the candidates’ thinking:

- “Walk me through your thought process as you were creating this.”
- “What could go wrong?”
- “What potential obstacles do you see in this 2-week period?”
- “How does this fit within the big picture of the job?”
- “Where are we in the grand scheme of the project and what comes next?”

After enough of these discussions, the participant will begin to think like a field leader and will be trained to constantly look two or three steps ahead on the project instead of being reactive. Much of this development involves getting the younger leaders to pull themselves out of the details and see the project from a bigger picture perspective.

“Planning is big. We have them develop 2-week lookaheads to help with planning. What materials and tools will you need 2-3 weeks from now? Planning is a big one and seeing the big picture. You have to learn to look ahead and understand the future needs of the project.”
– Senior Leader

Another best practice frequently cited is to have the candidate compose “lessons learned” reports as a developmental exercise. These can be completed either upon project completion, after a particular phase of the project is complete, or after the participant has finished a rotation in a role. These lessons learned reports should summarize the perspective of the participant, current field leader, project manager, and field crew. Not only does this force the participant to think critically and reflect on the project or phase just completed, but it gives them a chance to talk with members of the crew and leadership team to get their perspective on how the job went. These lessons learned reports can be a summary of what went well, what

could have been improved, and what changes they would recommend for the next job of similar scope. This will help participants collect information to be used on future projects after their report is approved by the coach or mentor and allow them to stay connected with what motivates and concerns the field staff.

Lessons learned reports can bring unique value by serving as a future resource for the company and a valuable developmental tool for future field leaders. All too often in the industry, leaders move from project to project; as soon as one concludes, they are on to the next one. This doesn't afford leaders an opportunity to reflect on the experience and identify lessons to pull forward. This stymies development of field leaders.

Finally, a great development opportunity to complete the program as a "capstone" event is to give formal presentations to leaders and executives about their experience. These presentations can recap their journey through the program, what they learned at each phase, and any ideas or recommendations they have for improvement. According to one "best in class" company example, after participants deliver their presentations to a group of executives, they get the option to select their own career path and explain why they want to pursue this path. For example, the participant can choose to move into project management, field supervision, or preconstruction based on what rotation they had the most passion for. Giving employees the power to choose their own career path can lead to greater engagement and greater retention among program participants and enable them to move forward with an understanding of how their role fits into the overall delivery of a project. Delivering a presentation to executives or giving presentations to department heads after each rotation will also give the participant an opportunity to develop their presentation skills and public speaking, which can be critical to obtaining new work with clients as they progress to different roles throughout their careers.

In summary, a field leadership development program is a great way to provide a career path for a potential next generation leader and give them the exposure and development opportunities they need to excel. An ideal program would give a candidate rotational

experience working in multiple roles on a given project to give them exposure to the big picture. This method would be even more effective if they can have the same rotational experience on multiple projects before the end of their program. This approach has the additional benefit of the participant working under multiple mentors and leadership styles, while getting oversight from a single "coach" throughout the life of the program. To maximize the benefits to the participant, provide them numerous and unique developmental opportunities to attend leadership meetings, provide 2-week lookaheads on jobs, compose lessons learned reports, and deliver presentations to various stakeholders, among others. Companies who have implemented their own field leader development programs should expect to see higher levels of job readiness, retention, and performance in role for their new leaders.

FLDP Component #3: Turning Performance Reviews into Career Discussions

For FLDPs to function well, future field leaders need to have honest and direct conversations with their supervisors about their growth, goals, and career path. Performance reviews, when conducted effectively, can be a powerful means for developing and accelerating future field leaders. Unfortunately, the performance review is often ineffective because it infrequently addresses development and career goals. Most often, performance reviews are perceived as an HR compliance activity for noting underperformance to avoid potential liability issues. Despite their reputation, when we examined "best in class" businesses that intentionally developed field leaders, they utilized performance reviews or development discussions to their advantage and turned traditional performance reviews into meaningful developmental and career growth conversations. A few key components were identified that help businesses get more out of the traditional performance review.

First, performance reviews need to happen on a regular cadence. Once per year seems to be the standard, but a quarterly review or at least every 6 months makes for more effective development discussions. While most managers claim that they have an "open door

policy” to be approached with any issues or concerns, we cannot stress enough the importance of creating an intentional space for employees to sit down with their supervisors and talk about what is really on their mind. It can be difficult, especially for a junior field leader in a fast-paced environment, to approach their supervisor and share that they don’t feel like they are getting the development they need for their current role. In our study, we frequently heard that those conversations just don’t happen.

Most of the industry seems to narrow their performance review conversations to focus only on current employee performance. This can certainly be part of the conversation so the employee knows what they are doing well and where they can improve. However, the most impactful review processes focus less on current performance and more on creating a plan for development and career goals and aspirations. Also, leaders should spend some time on the front end of these conversations to get to know their people better and build a stronger relationship. Take the time to demonstrate that you care about the individual as a person before getting down to business.

In lieu of diving into strictly performance-based discussions, ensure the employee has plenty of time to articulate their career goals and aspirations, as well as if they are receiving appropriate levels of support and resources to achieve them. Turning the typical performance review model on its head sends a signal to the employee that they are valued, the company is listening to them, and the company wants to help them achieve their goals. In turn, this type of message will breed loyalty that contributes to employee retention. As discussed at the beginning of this study, one of the primary challenges facing the field right now is finding capable field leaders who want extra challenges and increased responsibility. Using performance reviews as a space to have these types of conversations is a critical step in fixing that issue.

From a management lens, you can also use this conversation as a platform to promote the benefits of leadership positions. As we heard, many new field leaders struggled with going from “one of the guys” to the “boss” when first making the transition, which leads

to a leadership role being less appealing for some who might otherwise be interested. This will give you an opportunity to outline not only what the expectations are, but also promote why advancing their career can be so rewarding, beyond purely financial rewards.

A Sample Field Leader Development Discussion

Here’s a look at how great leaders translate the traditional performance review into a meaningful developmental discussion with the following sample questions.

“How is the family?”

“How are you in general?”

“What’s on your mind?”

“What are you excited about this year (personally or professionally)?”

“What are you enjoying learning about in the Field Leadership Development Program?”

“What do you wish you could learn more about?”

“Are we on track to meet your goals? If not, what else can we do to help?”

“What concerns to do you have?”

“What other goals have you set for yourself?”

“How have your priorities over the next year changed?”

“How else can I support you in the field and in your progression?”

“What do you need more of or less of from me to support you?”

“...Based on where you want to go, here are some things to work towards in the long term, and here is what we will be looking for by your next performance review in 6 months”.

Once you have identified employees’ aspirations to advance their career, together you can create a plan around what development they will need to take the next step. In subsequent performance reviews, be sure to revisit these aspirations. Asking the right questions in the performance review can open up some

interesting conversations you might have missed had you not created the space for them to share what is on their mind. Too often, performance reviews involve a great deal of the leader talking and very little listening. The more effective ones flip this script.

Performance reviews are often viewed as the bane of a manager's existence, but productive reviews can lead to more efficient development practices, accelerated development, higher employee loyalty, and increased employee retention.

FLDP Component #4: Deep Leadership Skill Development

While developing leadership skills may feel intangible to some field leaders, the leaders we spoke to acknowledge that FLDPs deepened their understanding of the connection of leadership skills to results on the job and helped them acquire new leadership skills. Some of the top skills developed at the most impactful offsite trainings, according to our respondents were:

- **Self-awareness:** Obtaining a better understanding of their own personality and how their personality shows up on the job. Participants explored how their leadership style affects others and what behaviors may be getting in the way of leading others more effectively.
- **Communication:** While this is a skill that can be learned on the job, getting an outside perspective was deemed helpful by a majority of our interviewees. Understanding how to listen better, communicate the “why” behind their message, and tailor their communication for their audience were critical skills that resonated with participants.
- **Emotional intelligence:** This skill is not often fully understood by field leaders, but the importance of understanding how to recognize and be in control of one's emotions while handling interpersonal relationships empathetically can go a long way in fast-paced, high-stress project environment. It is a requirement to build long-term trusting relationships.

- **Stress management:** Managing stress is an essential part of being a field leader. Taking the step from driving results yourself as an individual contributor to leading a group of employees can be a stressful jump on top of working longer hours, managing stakeholder expectations, and being accountable for results. This helps contribute to long-term success as a field leader.
- **Leading others:** Knowing how to motivate and inspire others, set direction, and align resources to put others in positions for success can be an invaluable skill that is not always learned on the jobsite.

Supplemental Leadership Development

In our study, we found that “best in class” companies did invest in training and development outside of the business to supplement and accelerate development for field leaders. However, the effectiveness of the offerings varied; to identify best offerings, we asked leaders to share insights into the most impactful piece of field leadership development they received and what made it so impactful. A few key themes emerged and are outline below. Reviewing these themes will help you evaluate field leadership development opportunities for your people.

Step Out of Your Comfort Zone

First, it is important that participants get out of their comfort zone. As with most skills in life, you only improve if you push yourself beyond what is comfortable and what you are used to doing. For example, do you think Olympic power lifters would get any stronger from lifting the same weight they are comfortable with? Certainly not. Some interviewees indicated that they showed up to the training expecting to sit silently through a presentation, take some notes and maybe answer a few questions, then return to the jobsite. However, participants found value in training that was interactive, hands-on, and made them a little uncomfortable.

“The interactive ones [are the training courses that stand out to me]. The ones that get you out of your comfort zone. The ones that force you to talk to groups and put you in uncomfortable situations..... to force you to have to talk is something that should be done more of for sure.”

– Superintendent

Many of the skills that next generation leaders need to be successful in their roles are difficult to pick up on the job or by reading a book. Most of these skills need to be practiced and role played through hands-on, interactive learning. Leveraging an offsite training program that allows them to practice these skills in a safe, risk-free environment will increase the likelihood of the leader using the skills learned when they return to the jobsite. Participants also mentioned that offsite training tends to be more effective because it allows them the opportunity to unplug from the daily grind and focus solely on the training rather than competing with the distracting emails and interruptions of questions or problems. If you are going to make the investment for training, make sure they are in a position to get the most out of it.

Executive Sponsorship

Next, a great way for field leaders to buy into the training is if they see their executives or superiors at the same sessions. A powerful message is sent when an executive attends the leadership training or at least sponsors it.

“You have everybody from early 20’s to 60’s in there getting out of their comfort zone. The CEO of the company was there! It really sent the message that this was important enough for him to take time out of his day to be there.”

– Project Manager

Having senior leaders and executives attend development [or publicly sponsor it] reinforces the message of how important and valuable effective leadership is to the company. Clearly, field leaders

take notice when executives are present rather than just sending them away for training and asking, “How did it go?” We realize this may not be possible in all cases, but when possible, this message reinforces the importance of the training and builds a stronger connection between the executives and the field.

Construction Application – Delivery Matters

Another way to ensure the training hits home with your next generation field leaders is to ensure it is tied directly to the job. An instructor with construction industry experience, particularly in the field, was cited as a major benefit of some of the most impactful training courses.

“It’s the person delivering the message..... It’s people like myself who have been in the trenches and have done the work that have come through the ranks and can talk to them in a way they can respect and identify with..... it’s sometimes the messenger that can help break down those walls. When you can make it more relatable to them, they listen to you. They care about it, it’s just about the person delivering the message.”

– Senior Leader

When asked why an instructor with a construction background was so helpful, respondents mentioned that it gives them higher credibility with the audience when they can share relevant stories and examples. An instructor with construction experience can make lessons more powerful by having participants role play scenarios they will likely see on the jobsite and can provide more pointed feedback having seen some of those situations play out in the field.

Make it Part of the Job

The final best practice when it comes to supplemental leadership development for field leaders: do not make it optional. If you are going to foster a culture of talent development and engrain it into your everyday practices, leadership development can’t be viewed as an additional cost of time or resources, it has to be viewed as an essential part of the role. This shift in mindset can

be a difficult transition for young field leaders to make. Oftentimes, new field leaders struggle to recognize that their job is now to lead their crew, not necessarily install the work themselves. Thus, developing their leadership skills through training is a valuable use of their time.

We acknowledge the incredible challenge in this area, given the current climate. At most, many field leaders may be able to attend such training once per year or in between projects, thus making it as crucial as ever to get maximum return for your investment in training. Communicating the “why” behind this development and how leadership training fits into their personal success and the success of the company is crucial. The time and money to invest in these offsite trainings can seem like a steep price to pay, but it is an investment that will deliver tremendous value through productivity in the field, employee loyalty, and employee retention.

Section 3: Transitioning Your Leaders into New Roles

The final set of best practices as it relates to accelerating the development of field leaders is about the final handoff: readying your field successor for a new role. According to our data, the keys to success in these areas center around developing a capable successor, strong mentorship, and putting your new field leaders in a position to succeed.

Strong Mentorship for Your Successor

Strong one-on-one mentoring is a critical aspect of building a smooth transition between field leaders. While mentoring often sounds great, in practice it is more difficult. For mentoring to work effectively, you must correctly pair a mentor and mentee. The relationship between them is critical to a successful mentorship process. The mentor provides the mentee a resource to approach for questions, concerns, and to bounce ideas off. The mentor does more than simply pass on their own knowledge and expertise to the mentee. They serve as a key steward to pass on the culture and brand of your firm that has made it so successful. Pairing next generation leaders with a successful current leader who meshes well with their

personality and is a top performer in their role will allow them to influence and support the mentee and serve as a resource to set them up for success in their transition. For some, having exposure to multiple mentors through their career can be impactful, as suggested by this interviewee:

“I pick and choose what I thought worked from different mentors. I figured out what worked for different people and adapted it to my style. I tend to pay attention to how people reacted. It was helpful when I took the next step because I had a network of people I could call when I had a problem I couldn’t solve.”

– Foreman

A mentorship program is simply a way for a next generation leader to get connected with a more experienced leader in the field to share knowledge and transfer some of the behaviors that made them successful. Ideally, if you had enough willing mentors, you would have people “opt in” or “self-select” to be a part of the mentor program so they were not forced to do so. This will ensure that those who are involved in the program are willing to help and the relationship feels more natural. The guidelines or parameters of the program will depend on your work and your company, but the important benefit, according to our interviewees, that comes out of the mentorship program is that the next generation leader has someone inside the organization that they trust and can go to for help with problems or questions.

The Mentor’s Skills Matter

An often-overlooked part of pairing mentors with mentees is making sure that the mentors have the tools and knowledge to properly mentor. This should go beyond simply “just watch what I do and then imitate it”. This should be a partnership where the mentor can provide oversight and even watch the mentee struggle at times while being there to support and help them grow. The first thing a mentor should be equipped with is the knowledge of how to have a proper development conversation. This will serve them well in future roles as they advance, since they will be more comfortable

and familiar with talent development conversations. To drive these types of conversations, mentors must have a clear understanding of the mentee's goals. Early in the process, establish some goals to accomplish in the first 30, 60, and 90 days (or even longer), then together develop a plan that works toward them. These goals will also give an anchor point to begin bi-weekly or monthly check-ins with the mentee.

The next tool a mentor should be prepared with is the ability to challenge thinking by asking great questions. Questions can be a far more powerful developmental tool than simply telling or showing someone how to perform a certain task. A powerful question can help the mentee think through the situation on their own to come up with a solution, with the mentor's oversight. The brain, just like the muscles in your body, needs to be worked and challenged to be developed. Asking great questions is a way to allow the mentee to flex their critical thinking skills and eventually learn how to think through challenges and problems on their own, instead of always looking for someone to provide them with the answer.

Here's a look at some questions a great mentor might ask a transitioning field leader who is working on a developmental goal...

"What obstacles do you expect might stand in the way of achieving this goal?"

"What do you need to do within the next week/month/year to accomplish that goal?"

"What skills or resources do you need to make this goal more manageable?"

Or, for example, when it comes to a particular issue they are having on the job:

"What have you tried so far?"

"What is the risk in that approach? What could go wrong?"

"What challenges are you running into with what you've tried? What possible solutions can you think of?"

Most experienced field leaders would be able to provide the answer to any of the questions identified in the box in a heartbeat, however, the benefit of taking the extra time to ask a few questions can help the mentee learn your thought process and eventually think through some of these issues on their own. The final mark of a great mentor is someone who is naturally more hands-off and empowers the mentee to tackle challenges themselves. It is a natural tendency in our industry to want to jump in and do things yourself, especially when you see someone struggling. A great mentor will point their mentee in the right direction but give them the autonomy to make their own mistakes and learn from them. Of course, good judgement will be needed so that high-risk tasks don't fall solely on the shoulders of a young field leader, however, any opportunity to take a step back and see how the mentee responds will go a long way for their development.

Setting Leaders up for Success

A strong relationship with a mentor is one way to set a new field leader up for a successful transition, but there are several other ways as well. The first way to set them up for success is to help build their confidence by putting them in positions to succeed early on in their development. This may sound simple, but throughout our interview process, we heard that it is fairly common not uncommon for companies to see a young, talented employee moving his way up in the organization and be tempted to staff him on your biggest, most complex project to let them soak in the experience and not be guaranteed to succeed.

Although the intentions are good, it does not help instill confidence in a young employee to have them bite off more than they can chew early on. The thinking is usually that if they can handle the big project, they will be able to handle anything. Not only does this potentially hurt the confidence of a young field leader, but it can also stunt their development as these projects are usually longer than your standard jobs. Make sure, especially early on in their development, they feel comfortable and confident in the job they are taking on, which will require close

communication with their mentor. Once they prove they can succeed and grow on more manageable jobs, they can begin to take on bigger and bigger challenges.

Key Relationships

The next way to set field leaders up for success is to ensure that all key relationships have been properly transferred over. People and relationships are often overlooked in field leader transition. Many new field leaders focus on the tactical side: the paperwork you have to do, the job responsibilities, the use of new technology, etc. These are important elements of the transition and deserve some time to introduce and explain. However, it's imperative not to lose sight of the importance of maintaining key relationships through the transition.

The first of which are the internal team relationships which may include field crews, shop foreman, and project managers. Even if a relationship may already exist between a new field leader and field laborers, addressing the challenge of transitioning from “one of the crew” to the “boss” can be difficult. Those who are willing to be visible in the field (not just when there is a problem), seek the opinion of the crew (especially the veterans), and keep an open mind to listen to suggestions, will have an easier time clearing this hurdle and maintaining a successful relationship for the long-term with their field crews.

“[You can earn their respect by] not saying ‘we are doing it this way; this is how we are going to do it.’ Involve your guys in the problem-solving process instead of just doing it your way. If you are demanding and want to do it your way, you are going to have some problems. I have found that way does not work as well as involving your men in the process. You are part of a team and make sure they feel like they are a valued part of the team.”
– Superintendent

With project managers and shop crews, it will help if the foundation of a relationship already exists with a new field leader. If possible, finding time for the new

field leader to work in the shop or attend meetings with the project manager (if applicable) will help them understand the preferences and pain points of those roles. Putting in the time to do this up front will help them work more effectively with these teammates.

Externally, it will be incumbent on the senior field leaders, or the field leaders they are replacing, to identify the key clients or relationships that need to be transferred before their departure. Ideally, this is a gradual process. Field leader transitions usually takes several months or even years, so introductions to these key external relationships, whether they be owners, GC's, or other trades, should be made as early as a successor is identified. This will give them an opportunity to work with the current field leader and absorb all the relevant information about client expectations, communication, and key players. If your organization has keystone clients or high priority external relationships to pass off from a current field leader who is approaching retirement, these relationships should be prioritized to transfer to your next generation as soon as possible. Each organization's relationships with key stakeholder may be different, thus, current leaders likely know the best ways to transfer these key internal and external relationships. The importance of doing this is often overlooked in the interest of speeding up the transition as much as possible.

To set new field leaders up for success, it is important that they know the resources they have that will aid their transition and how to access them. These resources could be tools, technology, policies and procedures, or people. A best practice for ensuring these resources stay visible is to compile them in a handbook, either paper or online. Having a strong mentor can help with day to day questions or if they need help with finding the right person to ask, but knowing where to look for guidance on frequently encountered problems or questions can be a useful way to empower your field leaders to work autonomously and feel supported along the way.

CONCLUSION

When building a truly enduring organization – one that can withstand challenges such as turbulent economic climates, shifting industry landscapes, and fierce competition – to establish a culture of talent development is critical to the company’s multi-generational success. There are many ways to begin building the foundation of this difficult mission. As recommended above, a great start would be taking an intentional approach to identifying talent, developing talent, making a successful transition, and retaining your top talent. However, as we previously mentioned at the onset of this paper, we found no “silver bullet”, or universally successful approach to ensuring a successful field leader transition. Each company must pick the right development strategy that works with their culture and organizational practices. The simple, overarching themes to successful field leader development can be explained by intentionality, persistence, and commitment to the process, no matter what approach a company took.

In a fast-pasted industry where margins are thin and time is at a premium, people development, especially at the field level, can be easily overlooked. We would be remiss to downplay the significance and severity of the challenges that monetary and time constraints provide. What we would encourage is for companies not to fall victim to, as Jim Collins would deem it, the *tyranny of the “OR”*. There does not have to be a choice between performing work effectively OR developing your next generation of leadership. There does not need to be a compromise between delivering quality projects OR giving new leaders the opportunity to be involved in hands-on development for current jobs. Instead, find ways to incorporate the *genius of the “AND”*. We can develop our new leaders AND execute work on time. We can invest in our workforce AND stick to our annual budgets. The challenges will be steep obstacles to overcome, but those who persist and find a way will find themselves with a competitive leadership advantage over their peers.

Companies who can find the right mix of talent development practices and implement them successfully will realize the benefits of a rich leadership pipeline and a culture of leadership that will persist long after the current ownership generation is gone. Like moving a steam-powered locomotive, building the foundation of this culture will be a great deal of work up front, it may even be uncomfortable. However, through consistent commitment, refinement, and improvement to the process, it will carry itself forward with incredible momentum and minimum oversight once it reaches full speed. Building your culture of talent development is your challenge to conquer, but as evidenced from the practices outlined above, it is possible for any company to achieve with the right persistence, intentionality, and mindset.

APPENDIX A: SURVEY DEMOGRAPHICS



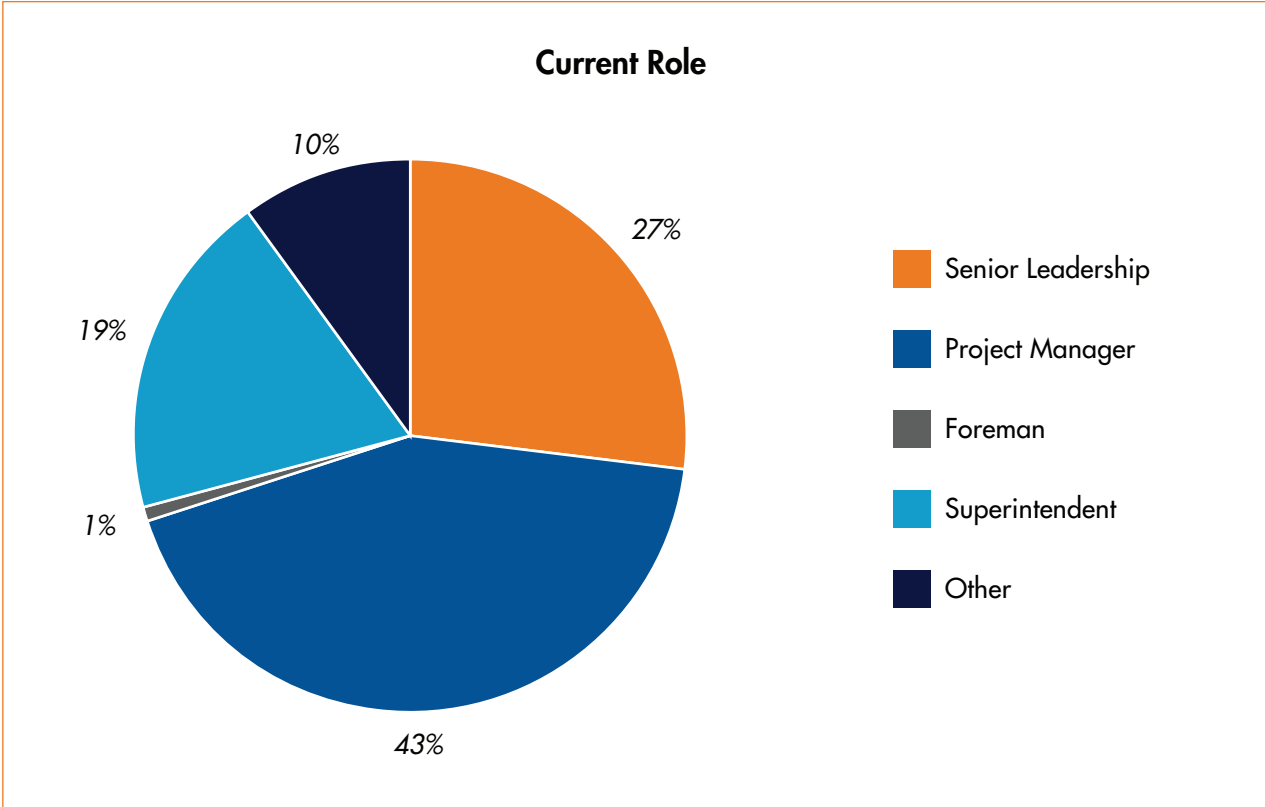
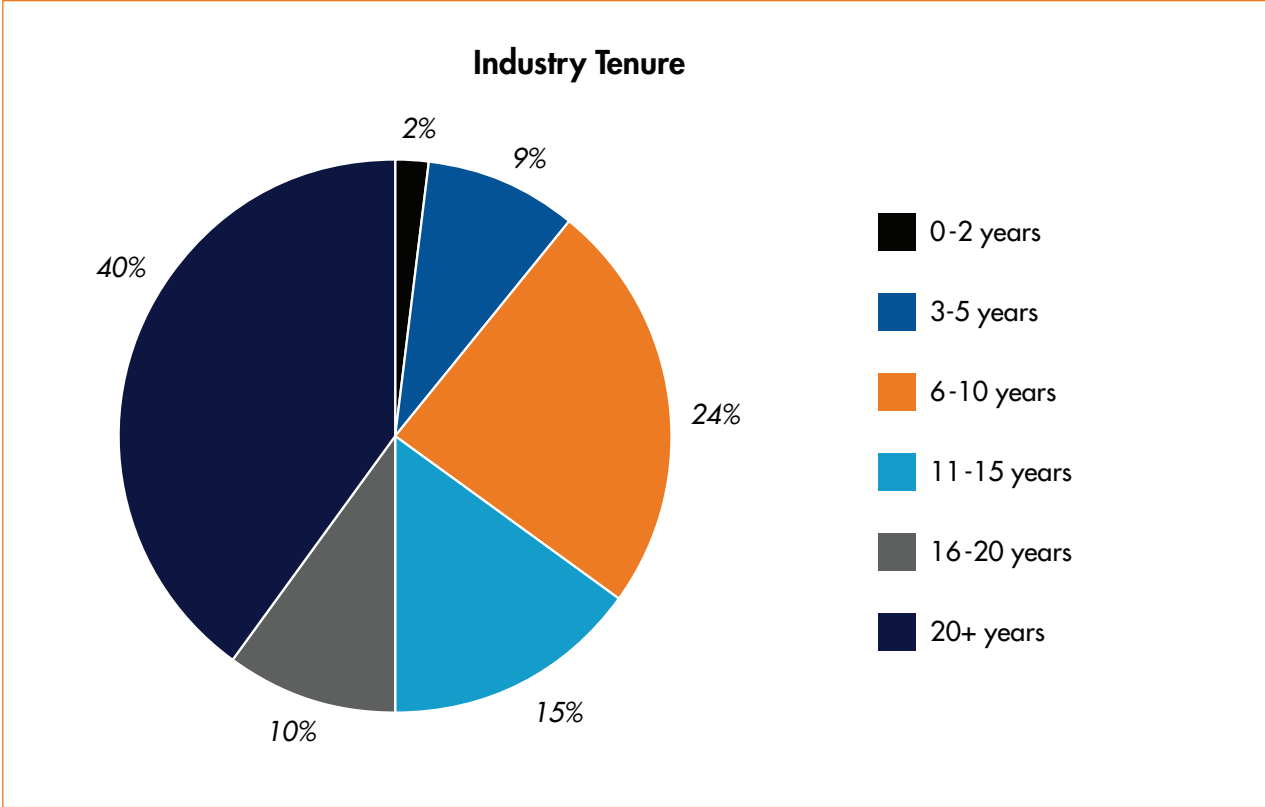
Total Respondents
= 178



Total Companies
= 74

Sector	<ul style="list-style-type: none">GC - Self-Performing = 47GC - Non-Self-Performing = 27Specialty Trade = 69Heavy Civil = 16Project Owner = 2
Annual Revenue	<ul style="list-style-type: none">0-\$50M = 32\$50M-\$99M = 44\$100M-\$499M = 55\$500M-\$999M = 23\$1B-\$1.5B = 2> \$1.5B = 7

BEST PRACTICES FOR FIELD LEADER SUCCESSION



BEST PRACTICES FOR FIELD LEADER SUCCESSION

