



September 8th, 2025

Ms. Joanna Biscette
Human Resources Manager
Jannou Credit Union
Jeremie Street
Castries, Saint Lucia

Proposal Submission – Succession Planning Program Development (RFP
Reference: JCU/RFP/SPP-2025)

Dear Ms. Biscette,

On behalf of WORK Digital Media, I would like to extend our sincere appreciation for the opportunity to submit a proposal in response to Jannou Credit Union's Request for Proposal (RFP) for the development of a Succession Planning Program. We commend Jannou's proactive commitment to leadership continuity, organizational resilience, and the long-term sustainability of its operations.

We confirm our intent to participate in this engagement and are confident that our team possesses the expertise, experience, and dedication required to deliver a comprehensive and practical succession planning framework. Our consultants bring proven experience in organizational development, leadership pipeline design, and governance support for financial institutions across the Caribbean. We also understand the unique regulatory environment within which credit unions operate and the importance of aligning human capital strategies with cooperative values.

We are excited by the opportunity to collaborate with Jannou Credit Union and to support the development of a robust succession planning program that not only safeguards operational continuity but also empowers future leaders to uphold and advance Jannou's mission.

Thank you again for considering our submission. We look forward to the possibility of working together and contributing to the continued success of Jannou Credit Union.

Yours sincerely,

Wamil Kendall
Managing Director
WORK Digital Media
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2. Executive Summary

[Jannou Credit Union](#) has demonstrated foresight in issuing this Request for Proposal for the development of a Succession Planning Program. We recognize that this initiative is not simply about filling positions but about ensuring the continuity of leadership, preserving institutional knowledge, and strengthening resilience in an increasingly dynamic financial environment.

Our firm brings extensive expertise in organizational development and leadership succession within financial institutions (fintech) and digital transformation. We have successfully supported small and medium sized entities, and regulated entities in designing leadership readiness frameworks, and governance-aligned policies. With a proven track record in delivering projects of this nature across entities, we are uniquely positioned to help Jannou achieve its goals.

Our proposed approach will:

- Assess Jannou's current organizational structure and identify critical roles, leadership gaps, and future needs.
- Design a customized succession planning framework, including clear policies, tools, and readiness matrices.
- Support Implementation through targeted workshops, coaching, and structured staff development strategies.
- Establish Monitoring & Evaluation mechanisms with KPIs and review cycles to ensure long-term effectiveness.

The deliverables will include:

- Succession planning policy and process documentation.
- Role risk and readiness matrix.
- Talent assessment and development tools.
- Implementation plan with timeline.
- Stakeholder engagement and communication strategy.
- Final report and presentation to the Board and Senior Management.

By partnering with us, Jannou Credit Union will receive not only a comprehensive succession planning program but also the strategic support required to embed succession planning into its



culture and HR systems. Our commitment is to provide actionable, practical solutions that ensure leadership continuity while upholding the values and cooperative principles at the core of Jannou's operations.

3. Understanding of Jannou & Context

Jannou Credit Union, headquartered in Castries with a branch in Vieux Fort, has established itself as a trusted financial institution serving public sector entities, quasi-government institutions such as WASCO, NIC, and LUCELEC, as well as individuals through family and beneficiary membership. Guided by the Co-Operative Societies Act No. 16 of 2024, the Co-operative Societies Regulation No. 16 of 2024, and its By-Laws of 2015, Jannou operates within a regulated and member-focused environment that requires strong governance and sustainable leadership practices.

We understand that Jannou is committed to long-term resilience and effective leadership transitions as part of its strategic human resource development goals. In today's financial services landscape, credit unions face pressures from evolving member needs, regulatory changes, and increased competition. Against this backdrop, continuity of leadership is vital not only for smooth operations but also for sustaining member confidence and trust.

Without a structured succession planning program, credit unions risk exposure to leadership gaps, operational disruptions, and the loss of critical institutional knowledge. These risks can undermine service delivery, delay decision-making, and create uncertainty among members and staff. Jannou's decision to pursue a formal succession planning initiative demonstrates foresight and a commitment to safeguarding its mission, values, and long-term sustainability.

Our team acknowledges this context and will tailor the program to Jannou's unique cooperative structure, ensuring alignment with governance standards, regulatory obligations, and cooperative principles. The solution will be practical, transparent, and designed to empower both current and future leaders in advancing the Credit Union's mission.

4. Our Understanding of the Objectives

We recognize that the primary objective of this engagement is to design, develop, and support the implementation of a comprehensive Succession Planning Program that ensures Jannou Credit Union's leadership continuity and operational sustainability.

Based on our review of the RFP and our understanding of Jannou's strategic priorities, we interpret the key objectives of this initiative as follows:

1. Ensure Leadership Continuity



- Prepare a pipeline of qualified leaders who can assume key positions with minimal disruption to operations or member services.
2. Strengthen Organizational Resilience
 - Build a succession planning framework that safeguards institutional knowledge and maintains member confidence during leadership transitions.
 3. Develop Future Leaders
 - Provide structured career development pathways, incorporating training, mentorship, and cross-functional exposure to equip employees for leadership roles.
 4. Align with Strategic HR Goals
 - Integrate succession planning with Jannou's existing HR strategies to improve workforce planning, employee retention, and talent development.
 5. Promote Transparency and Accountability
 - Establish clear policies and processes that guide succession planning in a manner consistent with cooperative values and good governance.

In short, we understand Jannou's goal to be not only the creation of a succession plan, but the embedding of a sustainable, repeatable process that will continuously prepare leaders for the future. Our proposed approach is designed to meet these objectives while ensuring that the program remains practical, measurable, and adaptable over time.

5. Proposed Approach & Methodology

Our approach is designed to be collaborative, practical, and tailored to Jannou Credit Union's cooperative structure and regulatory environment. We will deliver the Succession Planning Program through four key phases, ensuring both strategic alignment and operational feasibility.

Phase 1: Assessment

- Conduct a thorough review of Jannou's current organizational structure, governance framework, and leadership roles.
- Identify positions critical to business continuity and long-term success.



- Perform a talent gap analysis, evaluating current workforce capabilities against anticipated future leadership needs.
- Facilitate interviews, focus groups, or surveys with key stakeholders to understand succession risks, opportunities, and workforce readiness.

Phase 2: Design

- Develop a customized Succession Planning Framework that includes clear policies, process documentation, and governance guidelines.
- Create tools and templates for talent assessment, leadership development planning, and readiness mapping.
- Design employee development strategies, including mentorship programs, targeted training, cross-functional assignments, and rotational opportunities.
- Ensure integration of the framework with existing HR processes, performance evaluations, and workforce planning initiatives.

Phase 3: Implementation Support

- Provide hands-on guidance to leadership during rollout of the program.
- Facilitate capacity-building workshops for board members, management, and staff to ensure program adoption and understanding.
- Deliver coaching sessions to supervisors and HR teams to support ongoing management of succession activities.
- Establish clear ownership and accountability for sustaining the program within Jannou's HR function.

Phase 4: Monitoring & Evaluation

- Define Key Performance Indicators (KPIs) to track program effectiveness, such as successor readiness levels, leadership pipeline strength, and retention of high-potential employees.



- Develop a structured review cycle (e.g., annual updates) to keep the succession plan relevant and responsive.
 - Provide tools and dashboards for transparent reporting to the Board and Senior Management.
 - Recommend continuous improvement mechanisms to refine the program over time.
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Our Guiding Principles

Throughout all phases, our methodology is guided by:

- **Collaboration:** Engaging leadership, HR, and staff to build ownership and buy-in.
- **Practicality:** Delivering tools and processes that are simple to use and sustainable beyond the project period.
- **Alignment:** Ensuring the program reflects Jannou's cooperative values, governance standards, and regulatory environment.
- **Sustainability:** Building internal capability so Jannou can maintain and evolve the program independently in the long term.

6. Deliverables to Jannou

Upon completion of this engagement, our team will provide Jannou Credit Union with a comprehensive set of outputs designed to ensure both immediate impact and long-term sustainability of the Succession Planning Program. These deliverables will include:

1. **Succession Planning Policy and Process Documentation**
 - A formal policy outlining the principles, processes, and governance of succession planning at Jannou.
 - Step-by-step procedures to guide HR and leadership in managing succession planning activities.



2. Role Risk and Readiness Matrix

- A structured tool identifying critical roles, associated risks, and potential successors.
- Readiness assessments categorizing candidates as “Ready Now,” “Ready in 1–2 Years,” or “Ready in 3–5 Years.”

3. Talent Assessment and Development Tools

- Templates and tools for evaluating current talent, leadership competencies, and potential.
- Individual development planning guides to support targeted leadership growth.

4. Implementation Plan with Timeline

- A practical roadmap for rolling out the succession planning program, including milestones, responsibilities, and timelines aligned with Jannou’s strategic plan.

5. Stakeholder Engagement and Communication Strategy

- A structured plan for engaging the Board, management, and staff throughout implementation.
- Communication materials to promote transparency, inclusivity, and program understanding across the organization.

6. Final Report and Presentation

- A comprehensive report summarizing findings, program design, implementation support, and monitoring framework.
- A formal presentation delivered to the Board of Directors and Senior Management, including recommendations for sustaining the program beyond the project period.

7. Proposed Timeline & Milestones

We propose a structured project plan aligned with Jannou Credit Union’s timeframe of October 1, 2025 to January 30, 2026. The engagement will be delivered in four phases, ensuring timely progress, stakeholder involvement, and measurable outcomes.



Phase	Activities	Timeline	Key Milestones
Phase 1: Assessment	Review organizational structure, identify critical roles, conduct talent gap analysis, engage stakeholders through interviews/focus groups.	Oct 1 – Oct 21, 2025	Assessment report and preliminary findings submitted.
Phase 2: Design	Develop succession planning framework, policies, tools, and readiness matrix. Draft development pathways and training strategies.	Oct 22 – Nov 25, 2025	Draft succession framework and tools shared for feedback.
Phase 3: Implementation Support	Facilitate workshops for Board, management, and staff. Provide coaching for HR and leadership teams. Support rollout of framework and tools.	Nov 26 – Dec 31, 2025	Workshops completed; initial rollout of program tools.
Phase 4: Monitoring & Evaluation	Define KPIs, establish review cycles, create dashboards and reporting mechanisms. Finalize recommendations.	Jan 1 – Jan 20, 2026	Monitoring framework delivered.
Finalization	Compile final report and deliver formal presentation to Board and Senior Management.	By Jan 30, 2026	Final report and presentation submitted.

This timeline ensures that by the end of January 2026, Jannou will have not only a complete Succession Planning Program but also the tools, processes, and evaluation framework required to sustain it.

8. Our Team & Relevant Experience

Lead Consultant – Wamil O.R. Kendall

I, Wamil Kendall, will serve as the Lead Consultant for this engagement. With more than a decade of combined experience in digital transformation, organizational development, and leadership training across financial services, education, and corporate environments, I bring a proven ability to deliver structured, governance-aligned programs that build resilience and long-term sustainability.



Academic Preparation

- Master's in Business Intelligence & AI for Enterprise (2025–2027, MIU City University Miami) – Applying BI and AI to live product work, developing dashboards and machine learning–assisted decisioning for better retention and CAC payback analysis.
- B.Sc. IT Networking & Telecommunications (Honors, 2015–2017, University of Phoenix) – Capstone project focused on secure, cloud-first infrastructures; foundation for my later work in governance and compliance.
- Digital Marketing Professional Diploma (2019, Digital Marketing Institute) – Expertise in data-driven CRM and automation, transferable to building transparent talent development frameworks.
- Advanced Networking Certification (2017, University of Phoenix, Honors) – Strengthened expertise in systems architecture and governance.
- CISSP Certification (pending, 2025) – Reinforces capability to manage sensitive HR and organizational data within secure, auditable frameworks.

Relevant Professional Experience

- Digicel Group (2021–2025) – Digital Product Owner & Customer Relationship Manager
 - Reduced fraud-related support cases by 48% across 23 markets with cross-market monitoring and early-warning systems, showcasing risk-mitigation experience applicable to succession planning.
 - Managed distributed teams (Caribbean, UK, US, LATAM) with clear accountability systems, directly relevant to cultivating leadership readiness pipelines.
 - Delivered board-ready dashboards on retention, fraud, CAC, and reliability, demonstrating capacity to design reporting mechanisms for Jannou's Board and HR.
 - Trained 150+ staff in incident response and secure communications, creating SOPs that became enterprise standards, experience directly applicable to leadership training within Jannou.
- WORK Digital Media (2019–2025) – Managing Director & Digital Transformation Lead



- Directed AI-driven transformation across six markets, aligning strategy and measurable outcomes.
- Optimized a USD \$400k annual budget through ROI-focused prioritization, ensuring fiscal discipline in structured program delivery.
- Trained 120+ professionals in digital adoption and web applications, enhancing in-house capability and reducing dependency on external vendors.
- **Sir Arthur Lewis Community College (2023–2024) – Adjunct Lecturer**
 - Trained 130+ entrepreneurs to develop live MVPs, dashboards, and execution roadmaps, proving ability to convert theory into practice.
 - Designed templates and SOPs to ensure consistent program outcomes across multiple cohorts, a scalable model similar to succession program implementation.
- **Stewart’s Automotive Group (2019–2021) – Digital Marketing & Web Manager**
 - Achieved 90% digital transaction growth by bridging executive strategy with operational delivery.
 - Standardized governance across nine websites, creating durable systems for growth and continuity.

Engagement Model

While I will lead this engagement personally as the primary consultant, I will also draw on a network of specialist advisors in areas such as Human Resources Development, Organizational Psychology, and Cooperative Governance when additional expertise is required. This model ensures Jannou benefits from both consistent leadership and accountability from me as the principal consultant, while also accessing specialized expertise on demand without unnecessary overhead.

9. Budget & Fee Structure

Our proposed fee structure balances value for money with the depth of expertise required to deliver a comprehensive and sustainable succession planning program. All costs are quoted in United States Dollars (USD), with conversion to Eastern Caribbean Dollars (XCD) available upon request (USD 1 = XCD 2.70).



Proposed Professional Fees

Component	Activities	Estimated Effort	Fee (USD)
Phase 1: Assessment	Organizational review, stakeholder interviews, talent gap analysis	10–12 day	\$8,500
Phase 2: Design	Framework, policy docs, tools, readiness matrix	12–14 days	\$10,500
Phase 3: Implementation Support	Workshops, coaching sessions, rollout support	10–12 days	\$9,000
Phase 4: Monitoring & Evaluation	KPIs, dashboards, reporting framework, review cycles	8–10 days	\$7,000
Final Report & Presentation	Comprehensive report and formal presentation to Board & Senior Management	4–5 days	\$5,000

Subtotal (Professional Fees): \$40,000

Additional Costs (as needed)

- Specialist Advisors (e.g., HR, Organizational Psychology, Cooperative Governance), engaged only if required; billed at \$500/day with prior approval.
- Workshops / Training Materials – estimated at \$1,500 for printing, facilitation materials, and digital resources.



- Travel / Logistics, not anticipated for most of the engagement, but if required, reimbursable at cost (economy airfare, local travel, accommodation).

Estimated Total Engagement Cost: \$41,500 – \$45,000 (USD)

Payment Terms

- 30% deposit upon contract signing (mobilization).
 - 40% mid-project upon completion of Design Phase deliverables.
 - 30% final payment upon submission of the Final Report and Board presentation.
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Value for Jannou Credit Union

This engagement is designed to deliver not only the required outputs (policies, tools, frameworks) but also the internal capacity for Jannou to manage and sustain succession planning beyond the project. The flexible engagement model ensures that specialist expertise is available when needed without unnecessary overhead, making this approach both cost-effective and scalable.

10. References

I have had the privilege of leading and contributing to multiple organizational development, governance, and transformation initiatives across the Caribbean. While the following references represent different industries, they highlight my capacity to design structured programs, train diverse teams, and deliver measurable results in regulated, high-stakes environments.

1. Digicel Group – Financial Services Division (2021–2025)

- Engagement Focus: Risk management, leadership readiness, and governance improvements across 23 markets.
- Relevance to Jannou: Demonstrated ability to mitigate organizational risks, establish audit-ready protocols, and train 150+ staff in structured, repeatable practices, directly applicable to succession planning and institutional resilience.



- Contact: , Senior Product Owner Manager, Financial Services – Available upon request.

2. WORK Digital Media (2019–present)

- Engagement Focus: Digital transformation and leadership enablement across six markets, spanning financial services, hospitality, retail, and public sector.
- Relevance to Jannou: Designed and delivered executive-ready reporting, trained 120+ professionals in AI and digital adoption, and built scalable frameworks that reduced dependency on external vendors — experience highly relevant for building leadership capacity internally.
- Contact: Jasmine Duncan, Client Partner – Available upon request.

3. Sir Arthur Lewis Community College – Saint Lucia Youth Economy Agency Partnership (2023–2025)

- Engagement Focus: Training entrepreneurs in Saint Lucia across multiple cohorts in strategy execution, digital readiness, and KPI dashboarding.
- Relevance to Jannou: Showcases ability to design structured programs, standardize templates and checklists, and ensure consistent outcomes across diverse participant groups, mirroring the structured rollout needed for succession planning.
- Contact:
 - Tanya Warner, Program Director – Available upon request.
 - Olivia Jn Baptiste, Training & Development Officer - Available upon request.

4. Stewart’s Automotive Group (2019–2021)

- Engagement Focus: Governance, digital process improvements, and cross-functional leadership coordination in a highly competitive retail sector.
- Relevance to Jannou: Built standardized governance systems across nine websites, aligned executives around digital strategy, and delivered 90% growth in digital transactions, proving my ability to align leadership with operational continuity.
- Contact: Kim Bernard, Group Director – Available upon request.

Note on References



Full reference contact details can be provided upon request or at the contract negotiation stage, in order to respect confidentiality and prior client relationships.

11. Why Choose Us (Evaluation Alignment)

We recognize that Jannou Credit Union will evaluate proposals based on understanding of objectives, relevance of approach, experience and qualifications, value for money, and reference performance. Our proposal has been designed with these criteria in mind:

1. Understanding of Objectives

We clearly understand that Jannou's primary goal is not only to fill leadership positions but to embed a sustainable process that ensures leadership continuity, safeguards institutional knowledge, and strengthens member confidence. Our response demonstrates alignment with these objectives at every stage.

2. Relevance and Practicality of Approach

Our proposed methodology mirrors Jannou's required scope of work, with practical, step-by-step phases, Assessment, Design, Implementation Support, and Monitoring. This ensures the program is not theoretical but actionable, transparent, and adaptable to Jannou's cooperative environment.

3. Experience and Qualifications

As Lead Consultant, I bring a unique combination of:

- Proven governance and resilience-building experience (fraud reduction, audit-ready reporting, regulatory compliance across 23 markets).
- Expertise in leadership and talent development (training 600+ professionals and entrepreneurs in structured programs).
- Academic grounding in Business Intelligence, AI, and IT governance, ensuring modern, data-driven approaches.
This blend of technical, strategic, and training experience is directly aligned with Jannou's needs.

4. Value for Money and Cost Effectiveness

Our fee structure is transparent, phased, and tied directly to deliverables. By leveraging a solo consultant model with specialists engaged only when necessary, Jannou benefits from cost



efficiency without compromising access to niche expertise. This approach ensures maximum return on investment.

5. References and Past Performance

Our past engagements, including Digicel Group, WORK Digital Media, Sir Arthur Lewis Community College, and Stewart's Automotive Group, demonstrate consistent delivery of structured, measurable programs in regulated, high-stakes environments. These references validate our ability to execute successfully and sustainably.

Summary

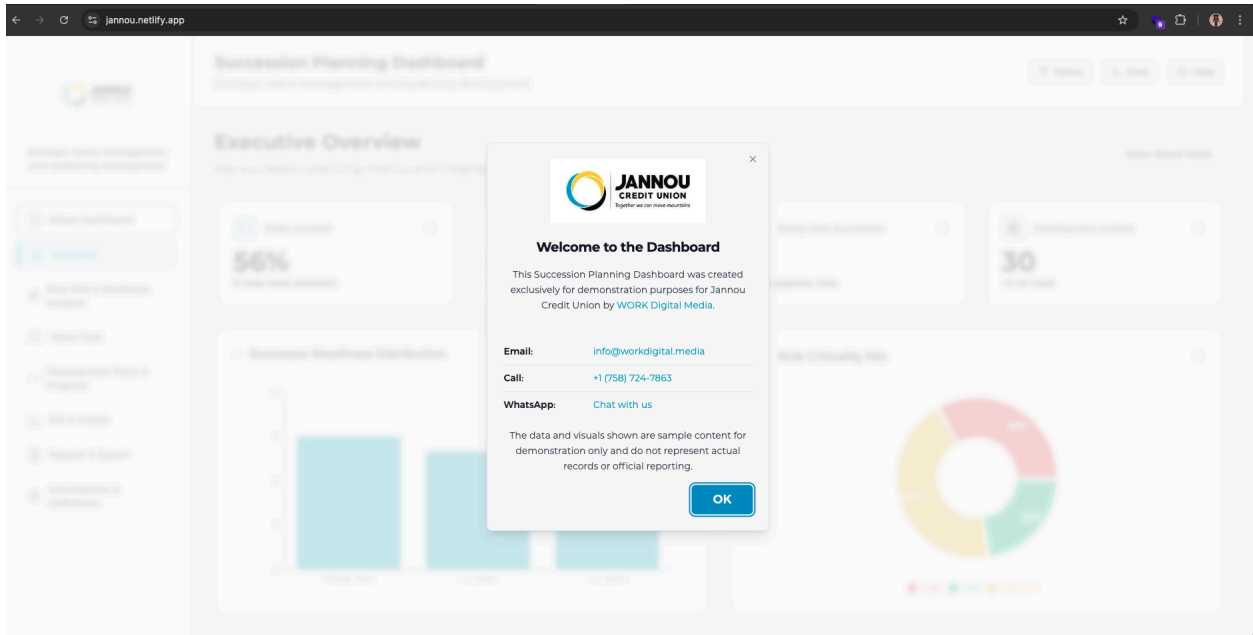
Jannou Credit Union requires a partner who not only understands succession planning at a conceptual level but can also translate strategy into practical frameworks, tools, and training that will endure beyond the project timeline. With proven experience, a clear methodology, and a cost-effective engagement model, we are confident that we represent the best partner for this initiative.



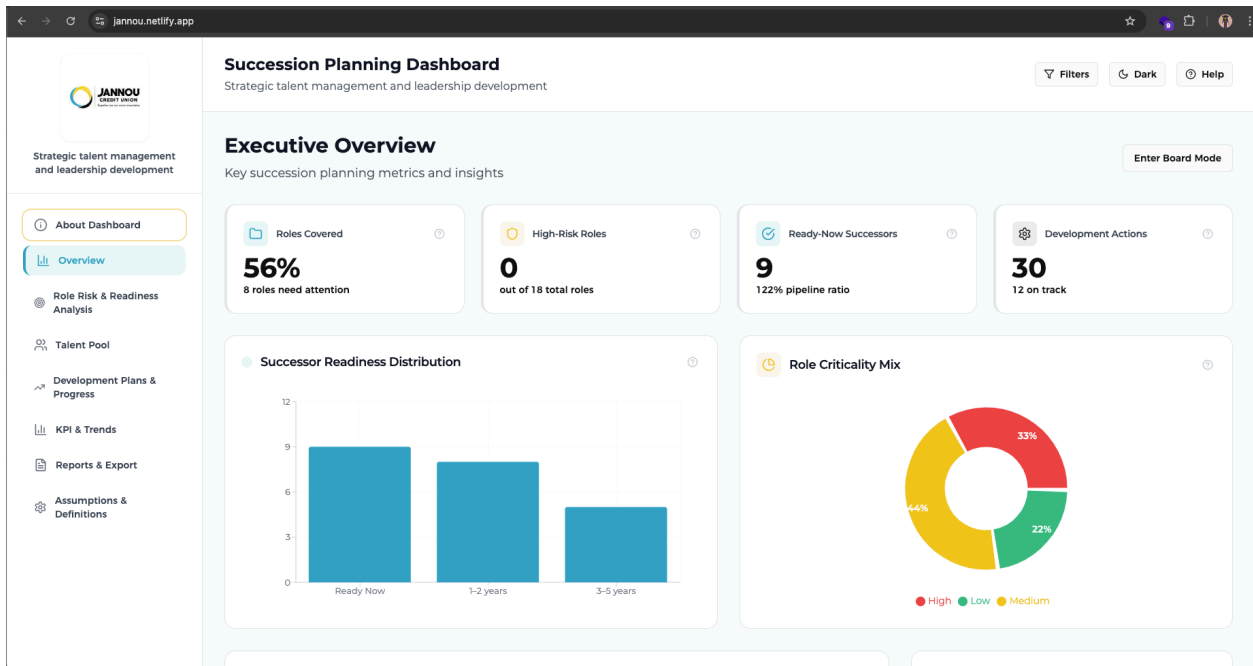
Sample



1. Homescreen

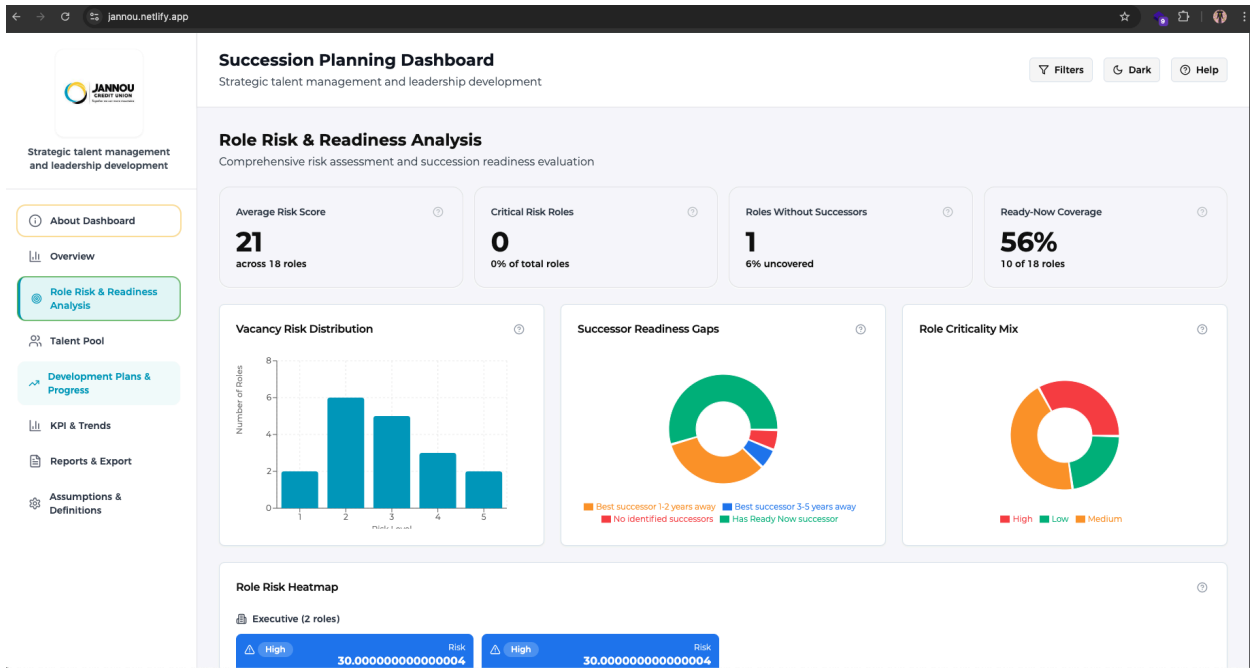


2. Overview

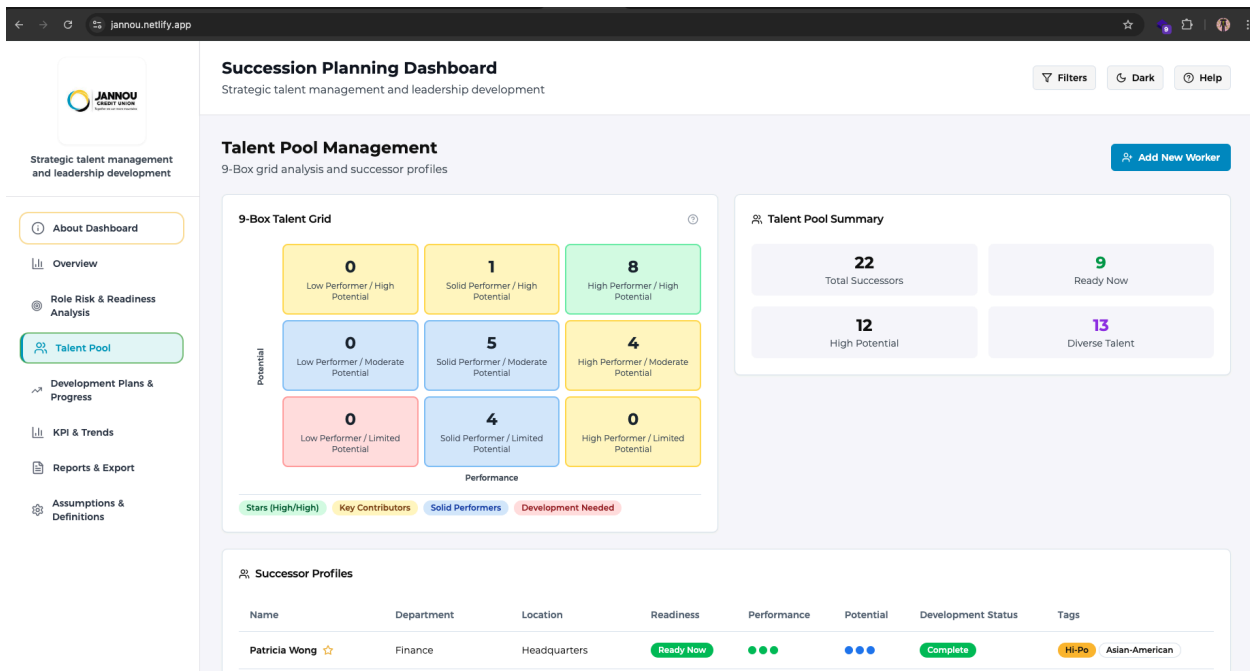




3. Role Risk & Readiness Analysis



4. Talent Pool Management





This website functions as a comprehensive Succession Planning Dashboard designed by Wamil Kendall and the team at WORK Digital Media for Jannou Credit Union to help them manage and develop their talent pipeline, assess risks, and plan for future leadership needs. It provides a centralized platform for strategic talent management and leadership development.

Here's a summary of its main sections and features:

Core Functionality & Navigation

The dashboard is organized into several key sections, accessible via a sidebar navigation:

- **Overview:** Provides an executive summary of key succession planning metrics and insights.
 - **KPI Cards:** Displays critical metrics such as "Roles Covered," "High-Risk Roles," "Ready-Now Successors," and "Development Actions," with color-coded indicators for performance.
 - **Successor Readiness Distribution Chart:** Visualizes the distribution of successors across different readiness bands (e.g., Ready Now, 1-2 years, 3-5 years).
 - **Role Criticality Mix Chart:** Shows the breakdown of roles by their criticality levels (High, Medium, Low).
 - **Top Risk Roles Table:** Lists roles with the highest calculated risk scores, along with their departments, successor counts, and key risk factors.
 - **Key Insights:** Offers summarized textual insights derived from the data.
 - **Board Mode:** A toggle to optimize the view for presentations, featuring larger fonts and simplified UI.
- **Role Risk & Readiness Analysis:** Offers a detailed assessment of roles based on their succession risk and readiness.
 - **Summary KPI Cards:** Provides quick insights into average risk score, critical risk roles, roles without successors, and ready-now coverage.
 - **Risk Factor Distribution Charts:** Visualizes the distribution of roles based on vacancy risk, successor readiness gaps, and criticality.
 - **Role Risk Heatmap:** A visual representation of roles grouped by department, color-coded by their risk level (Critical, High, Medium, Low), with popovers for detailed information.
 - **Detailed Role Assessment Table:** A comprehensive table listing all roles with their department, location, criticality, vacancy risk, calculated risk score, successor counts, and best successor information. This table is sortable by various criteria.
- **Talent Pool Management:** Focuses on managing and analyzing successor profiles.
 - **9-Box Talent Grid:** A visual tool that plots successors based on their performance and potential, allowing users to filter the talent pool by specific quadrants.
 - **Talent Pool Summary:** Quick statistics on total successors, ready-now candidates, high-potential individuals, and diverse talent.



- Successor Profiles Table: A detailed table of all successors, including their department, location, readiness, performance, potential, development plan status, and diversity tags.
- Skill Gap Analysis Table: Identifies missing competencies between role requirements and successor capabilities, showing skill match percentages, gap severity, and specific missing/required skills.
- Development Plans & Progress: Provides tools to track and monitor development initiatives.
 - Development KPI Cards: Key performance indicators for development actions, such as active actions, on-track rate, at-risk actions, and completion rate.
 - Development Status Distribution Charts: Pie and bar charts illustrating the breakdown of development actions by their current status (Planned, On Track, Delayed, At Risk, Done).
 - Development Timeline: A visual timeline showing the duration and status of development actions for each successor, with adjustable timeframes (6 months, 1 year, 2 years).
 - Development Actions Tracking Table: A sortable table listing all development actions with details like title, successor, target role, owner, timeline, status, and calculated progress.
- KPI & Trends Analysis: Presents historical performance metrics and trend analysis over time.
 - Summary Cards: Quick overview of current values and trend indicators (up, down, neutral) for key metrics like Succession Coverage, High-Risk Roles, Development Completion, and Diversity.
 - Line Charts: Visualizes trends for various KPIs including Succession Coverage, High-Risk Roles, Development Completion Rate, Internal Promotion Rate, Average Time to Fill, and Diversity in Pipeline.
 - Successor Readiness Pipeline Evolution (Stacked Bar Chart): Shows how the distribution of successors across readiness bands has changed over time.
- Reports & Export: Enables users to generate and export comprehensive reports.
 - Report Selection: Users can select individual reports from categories like Executive, Analytics & Trends, and Operational Reports.
 - Bulk Export Controls: Allows selection of multiple reports for export in various formats (PDF, Excel, PowerPoint, JSON).
 - Quick Stats: Provides an overview of available reports, export formats, and selected reports.
 - Export Formats Section: Details the types of exports available (PDF, Excel/CSV, PowerPoint, JSON) with corresponding export buttons.
 - Automation & Scheduling Section: Features for scheduled reports, email distribution, and custom templates (conceptual).
 - Key Insights Preview: Displays a preview of generated insights.



- Assumptions & Definitions: Documents the methodology, calculations, and industry benchmarks used throughout the dashboard.
 - Key Definitions: Glossary of important terms like Succession Coverage, High-Risk Role, Ready-Now Successor, Pipeline Ratio, High-Potential, and Development Completion Rate.
 - Risk Scoring Methodology: Explains the factors (Role Criticality, Vacancy Risk, Readiness Gap) and their weights in calculating risk scores.
 - Data Assumptions: Outlines assumptions made about data inputs like performance ratings, potential ratings, and readiness timelines.
 - Calculation Methods: Provides formulas and examples for key metrics like Risk Score, Succession Coverage, Pipeline Ratio, and Development Completion Rate.
 - Industry Benchmarks: Compares internal metrics against industry standards from various sources.
 - Quality Standards: Describes data quality and validation processes.

Overarching Features

- Global Filters: Allows users to filter data across the entire dashboard by department, location, role criticality, successor readiness bands, and date range. Filters persist and can be cleared.
- Dark Mode: A toggle to switch between light and dark themes for improved user experience.
- Help System: Contextual help popovers (HelpCircle icons) are integrated throughout the dashboard to explain metrics, charts, and tables.
- Data Management: Supports CSV import/export for roles, successors, and development actions, and includes comprehensive sample data.
- Responsive Design: Optimized for various screen sizes, including desktop, tablet, and mobile.
- Accessibility: Designed with keyboard navigation, screen reader compatibility, WCAG AA compliant color contrast, and clear focus indicators.

You may access the platform here without any authentication: <https://jannou.netlify.app/>



Off the shelf and plug 'n play solutions



Top 3 Recommendations for Succession Planning Software

1. SuccessionHR

Website: SuccessionHR

Base Price: Starting at US \$7,500 per year, flat rate for up to 49 key roles; scales to ~\$10,000 for 50–99 roles, ~\$15,000 for 100–249 roles, and ~\$20,000 for 250–499 roles annually.

Integration Cost & Setup Requirements:

- Minimal integration needed, optional API integrations with common HRIS/payroll systems (e.g., BambooHR, Workday, Rippling).
- Setup includes role mapping, data import (via CSV), basic configuration, and administrative training.

Why Recommended:

- Easy, flat pricing makes budgeting straightforward.
- Focused solely on succession planning, no bloat.
- Strong user feedback for clean setup and responsive support.

2. TalentGuard (Optimize Bundle)

Website: TalentGuard Succession Planning Software

Base Price: Starts from roughly US \$3 to \$8 per user per month; other sources indicate enterprise plans may begin at \$25,000 per year, depending on modules and seat count.

Integration Cost & Setup Requirements:

- Connects to existing HR, performance, and learning systems (e.g., Workday, Oracle, SAP).
- Requires data mapping, initial config of roles & competencies, and admin training.

Why Recommended:

- Deep functionality: talent pool analytics, development planning, career pathing, AI-driven insights.



- Modular bundles allow you to expand over time.
- Strong scalability for a growing organization.

3. SAP SuccessFactors – Succession & Development Module

Website: SAP SuccessFactors

Base Price: Approximately US \$1.91 per user per month for the Succession & Development module; broader HCM Suite packages range from \$25–38 per employee/month.

Integration Cost & Setup Requirements:

- Designed to integrate seamlessly across SAP’s HR ecosystem (e.g., Employee Central, Performance).
- Implementation costs typically add 100–125% of annual licensing due to complexity.
- Rollout typically spans 3–6 months, with technical resource involvement, change management, and formal training required.

Why Recommended:

- Industry-leading enterprise platform with end-to-end HR integration.
- Best fit if you plan to migrate into a full HR suite later.
- Strong global support and governance capabilities.

Summary Comparison Table

Software	Cost Estimate	Integration & Setup	Fit for Jannou
SuccessionHR	\$7,500/year flat (up to 49 roles)	CSV import, basic config, quick rollout	Clean, predictable, focused solution
TalentGuard	\$3–\$8/user/month or \$25,000+/year	HRIS/performance tool integrations	Powerful analytics, scalable, AI-enabled



SAP SF	~\$1.91/user/month module; \$25–38/user/month (suite)	High implementation cost & complexity	Enterprise-grade, fully integrated with HR systems
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Recommendation Picks

1. SuccessionHR – Best fit for simplicity, easy deployment, and cost predictability—ideal for a focused, no-fuss succession solution.
2. TalentGuard – Ideal if Jannou wants advanced analytics, AI support, and future expansion into career and performance management.
3. SAP SuccessFactors – Consider only if you're planning a full-suite HR transformation with governance and global needs; excellent but resource-intensive.

Implementation Cost Proposal – USD 27,500 (4 Months)

We propose an implementation fee of USD 27,500, spread across the four-month engagement. This reflects the expertise, time investment, and resource coordination required to successfully design, configure, and deploy a succession planning solution tailored to Jannou Credit Union's needs, regardless of the platform selected (SuccessionHR, TalentGuard, or SAP SuccessFactors).

Justification for Cost

1. **Specialized Expertise** – Succession planning is not a generic HR function; it requires combining governance, HR strategy, data structuring, and change management. My experience leading large-scale transformation across 23 markets ensures that Jannou receives a best-practice solution.
2. **Customization & Alignment** – Plug-and-play software still requires contextual adaptation: mapping critical roles, structuring readiness matrices, configuring dashboards, and embedding Jannou's governance and cooperative principles.
3. **Stakeholder Training & Change Management** – Ensuring adoption across Board, HR, and management teams requires structured training sessions, templates, and



support—not simply software setup.

4. Sustainability – Deliverables include documentation, KPIs, and review cycles so Jannou can independently manage the program beyond this engagement.
5. Vendor-Independent Support – By acting as the lead consultant, I ensure Jannou is not “locked in” to vendor services and retains in-house capability to evolve the program.

Cost Breakdown (USD 27,500)

Phase	Activities	Effort	Cost Allocation
Phase 1: Assessment (Weeks 1–3)	Review organizational structure; identify critical roles; conduct talent gap analysis; stakeholder interviews.	10–12 days	\$6,000
Phase 2: Design (Weeks 4–7)	Develop succession framework, policy docs, readiness matrix, tools/templates; align with HR processes.	12–14 days	\$7,500
Phase 3: Implementation Support (Weeks 8–12)	Configure chosen platform (SuccessionHR/TalentGuard/SAP); workshops for Board/HR; coaching sessions.	10–12 days	\$8,000
Phase 4: Monitoring & Evaluation (Weeks 13–16)	Establish KPIs; build reporting dashboards; finalize review cycles; deliver final report & presentation.	8–10 days	\$6,000

Total Professional Fees: USD 27,500

(exclusive of vendor license fees, software subscriptions, or optional third-party specialist costs if engaged).



Included in Fee

- Full project management & coordination with vendor.
- Custom configuration of succession software.
- Stakeholder engagement sessions (Board, HR, Management).
- Templates, documentation, and training materials.
- Final report & presentation to the Board.

Not Included (Optional Costs)

- Annual software license (varies: \$7,500/year for SuccessionHR, \$25,000+/year for TalentGuard, or SAP per-user pricing).
- Third-party specialist fees if Jannou requests extended HR or organizational psychology involvement.
- Travel or accommodation (if in-person delivery is required).

Conclusion

Succession planning is more than a compliance exercise; it is a commitment to safeguarding Jannou Credit Union's future, strengthening its resilience, and empowering its people to lead with confidence. By implementing a structured and sustainable succession planning program, Jannou will ensure continuity in leadership, preserve institutional knowledge, and maintain the trust of its members and stakeholders.

As Lead Consultant, I bring the expertise, experience, and dedication required to design and deliver a program that aligns with Jannou's cooperative values, governance standards, and strategic objectives. This proposal outlines not only a methodology and set of deliverables but also a partnership approach—one that ensures knowledge transfer, capacity building, and long-term sustainability for the Credit Union.

We are confident that with this engagement, Jannou will be well positioned to anticipate leadership needs, cultivate future leaders, and strengthen its position as a trusted and resilient



financial institution in Saint Lucia. We look forward to the opportunity to work alongside you in achieving this vision.

The End