



# Succession Planning

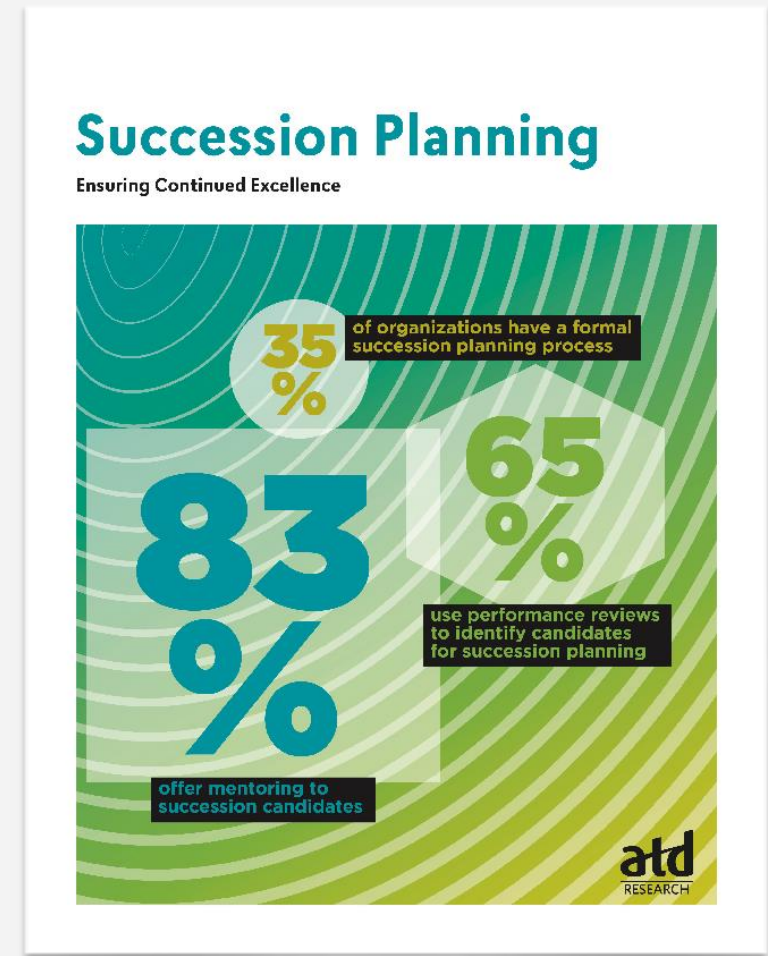
Ensuring Continued Excellence

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# The Report

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- Report published in November 2018
- 585 participants
- Builds on previous succession planning research by ATD
- Interviews with several talent development professionals



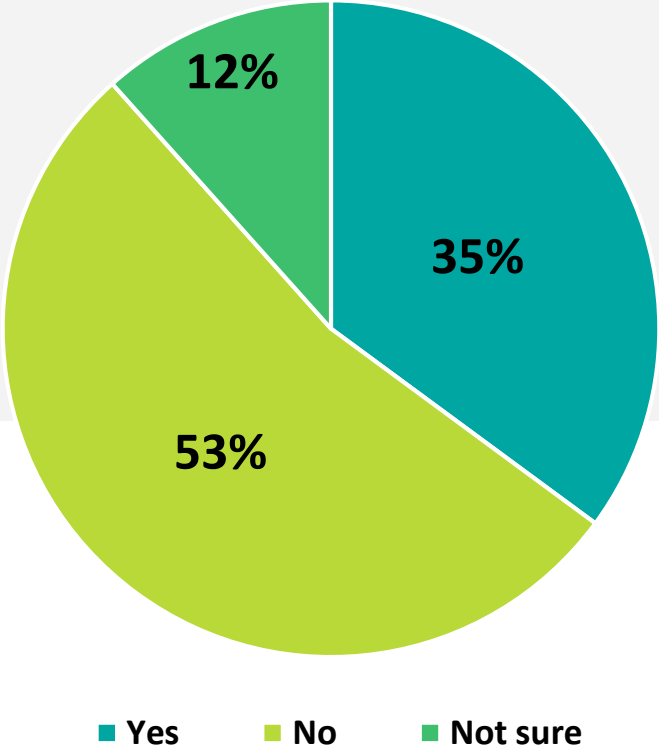
# The Participants

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- 36 percent of participants were from organizations with fewer than 1,000 employees.
- 63 percent of respondents were managers or above.
- 57 percent of participants were from national organizations.



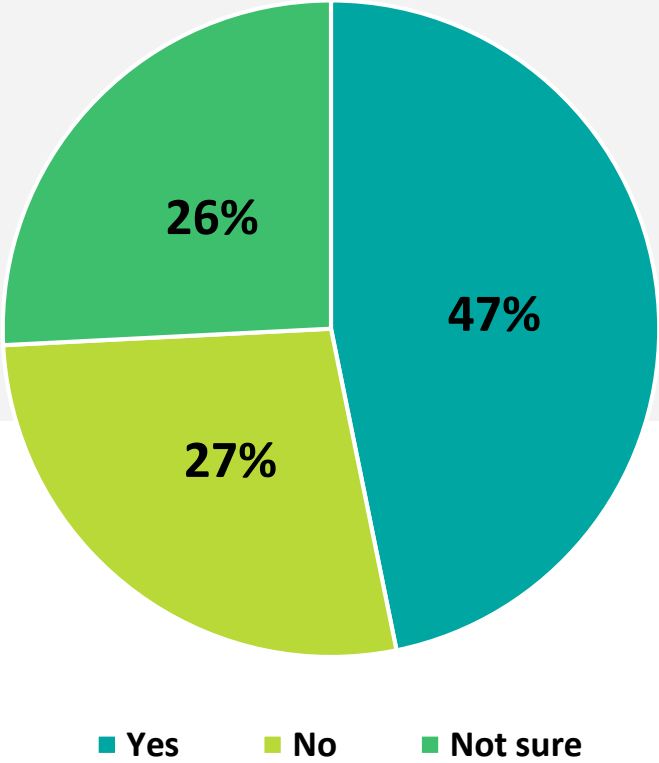
# Existence of Formal Succession Planning Processes



Q: Does your organization have a formal succession planning process?  
Segment: All respondents



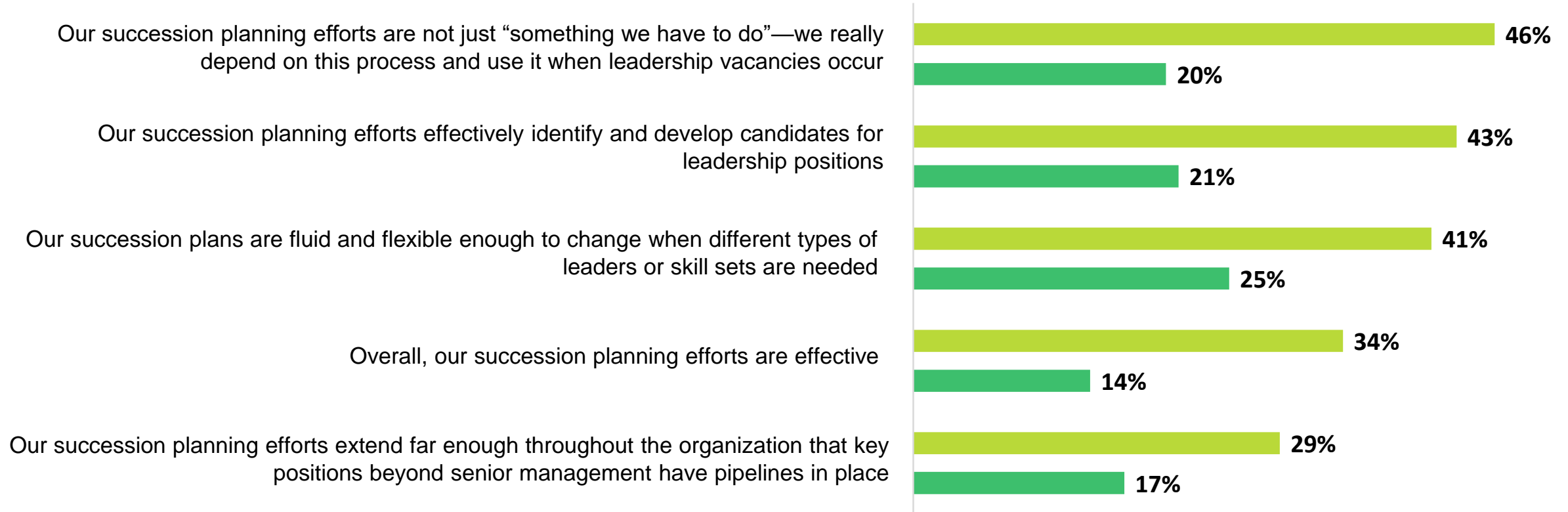
# Plans to Create a Succession Planning Process



Q: Does your organization have plans to create a formal succession planning process?  
Segment: Organizations without a formal succession planning process



# Succession Planning Year-to-Year Comparison



Percent indicating high or very high extent.

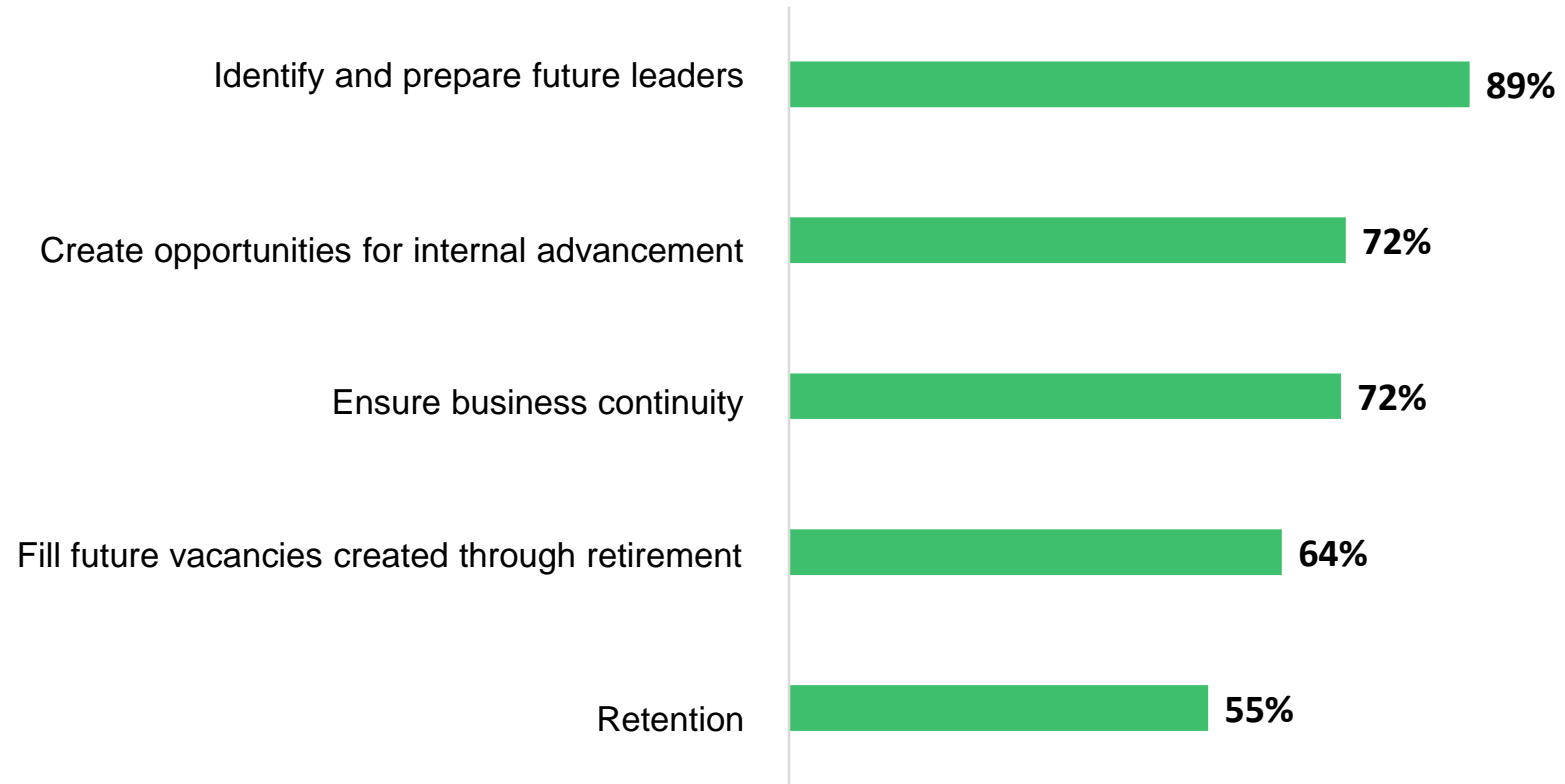
2018

2010

Q: To what extent do you agree with the following statements?  
Segment: Organizations with a formal succession planning process



# Top 5 Reasons for Adopting a Formal Succession Planning Process

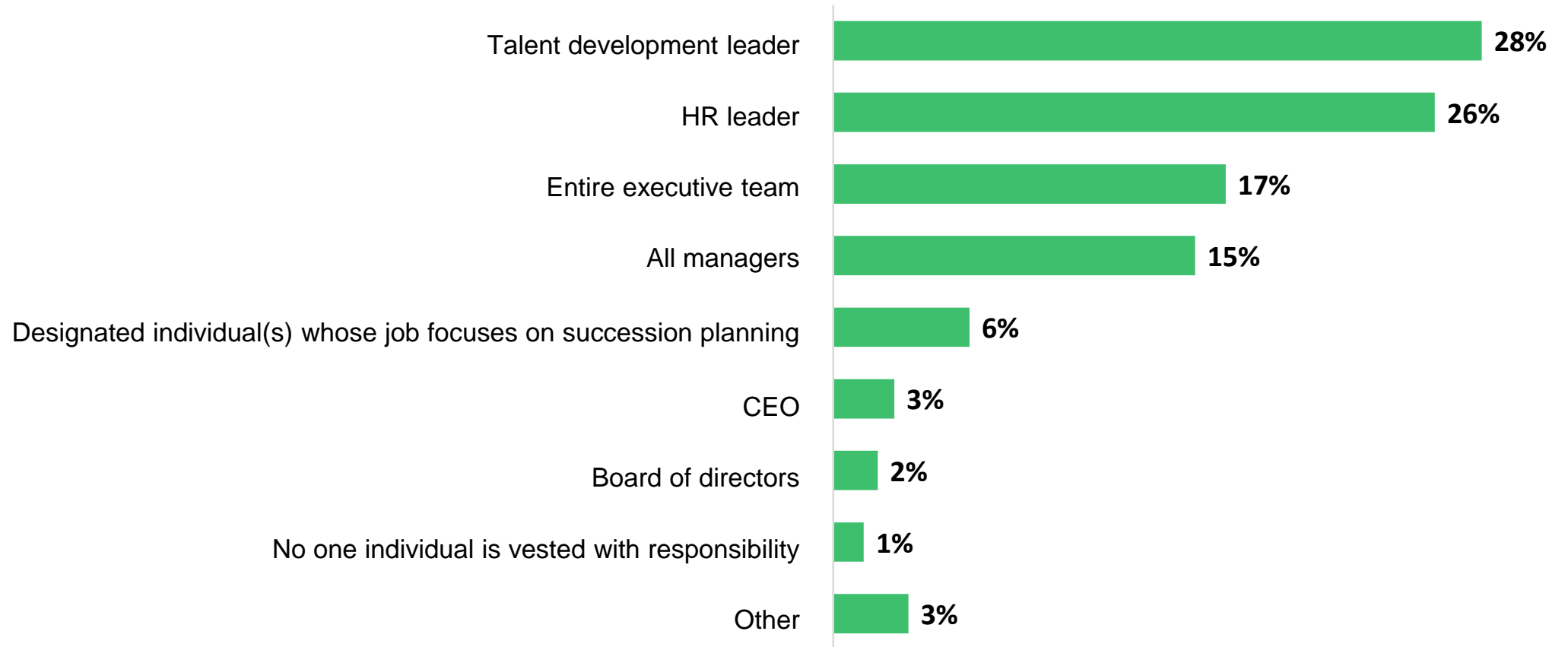


**Percent indicating high or very high extent.**

Q: For what reasons did your organization adopt a formal succession planning process? Select all that apply.  
Segment: Organizations with a formal succession planning process



# Responsibility for Succession Planning



Q: In your organization, which person or group is primarily responsible/accountable for succession planning efforts?  
Segment: Organizations with a formal succession planning process





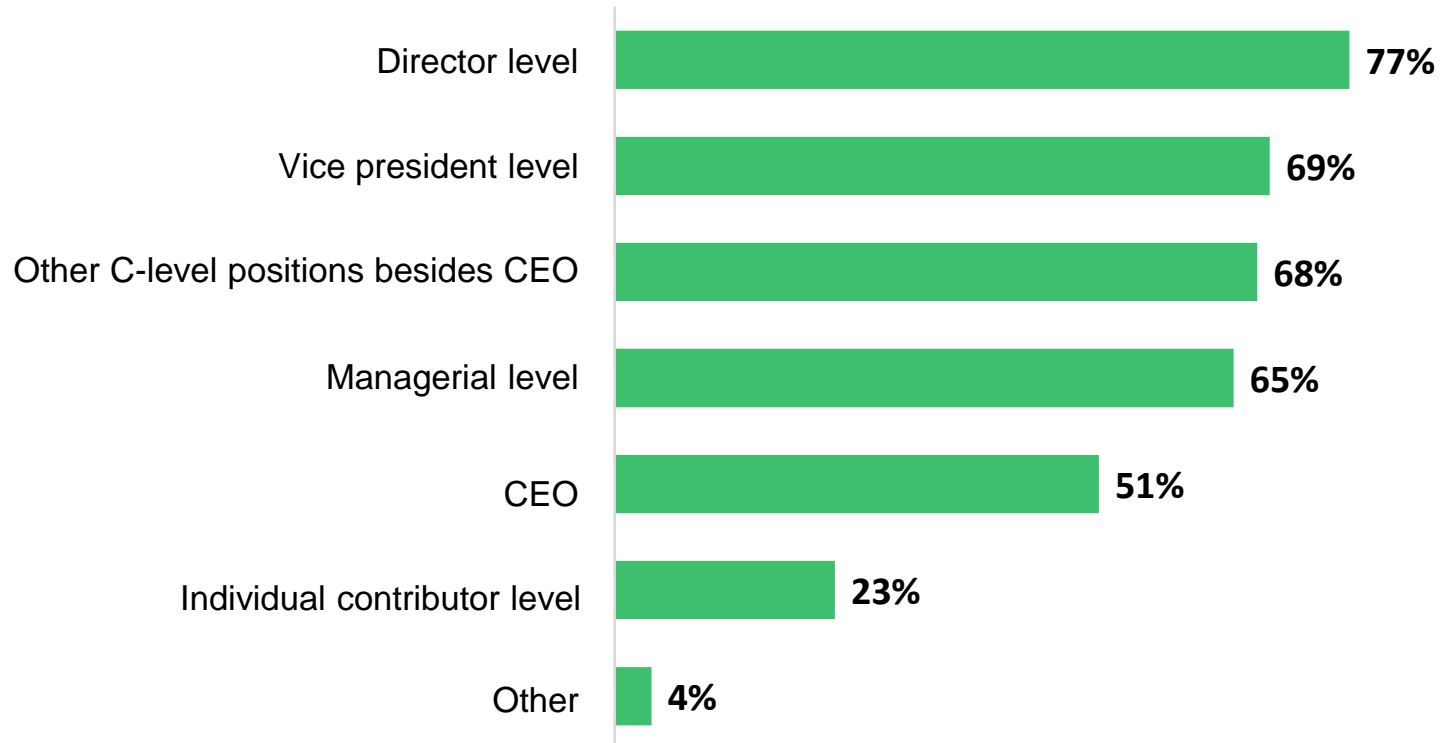
# Involvement in Succession Planning Efforts



Q: In your organization, who else is involved with succession planning efforts? Select all that apply.  
Segment: Organizations with a formal succession planning process



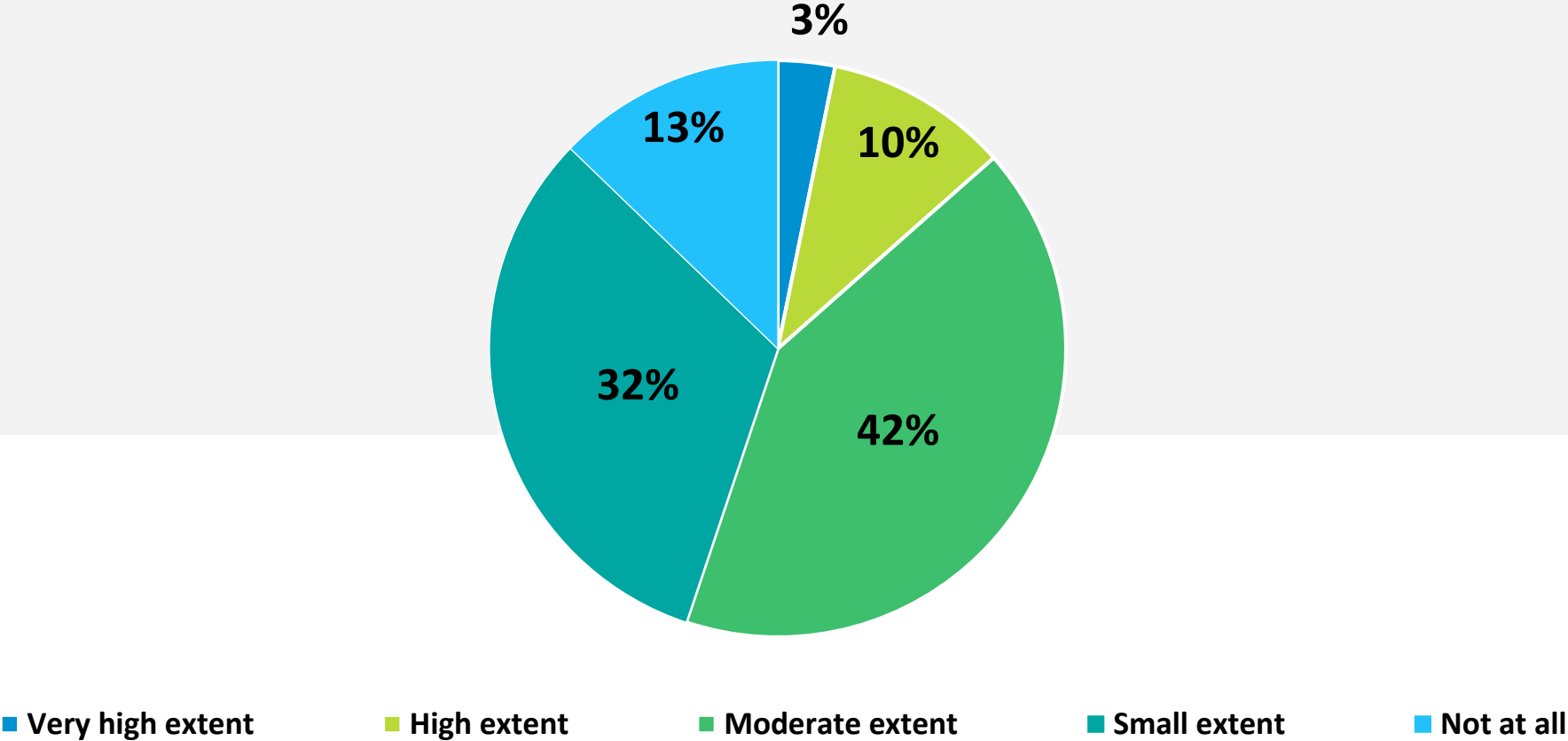
# Positions Addressed by Succession Plans



Q: Which position(s) does your organization's succession plan(s) address? Select all that apply.  
Segment: Organizations with a formal succession planning process



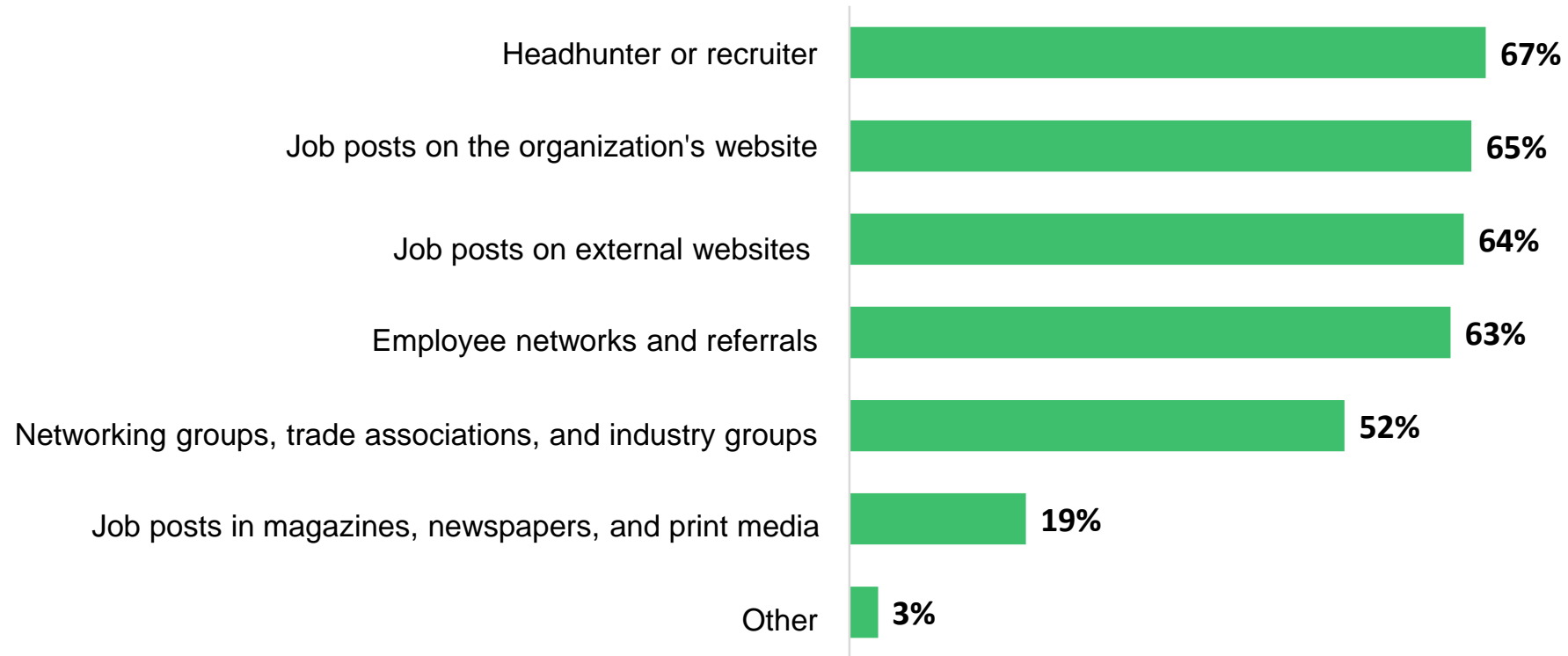
# Talent Sought Outside Pipeline



Q: To what extent do you seek talent outside your organization for your succession planning pipeline?  
Segment: Organizations with a formal succession planning process



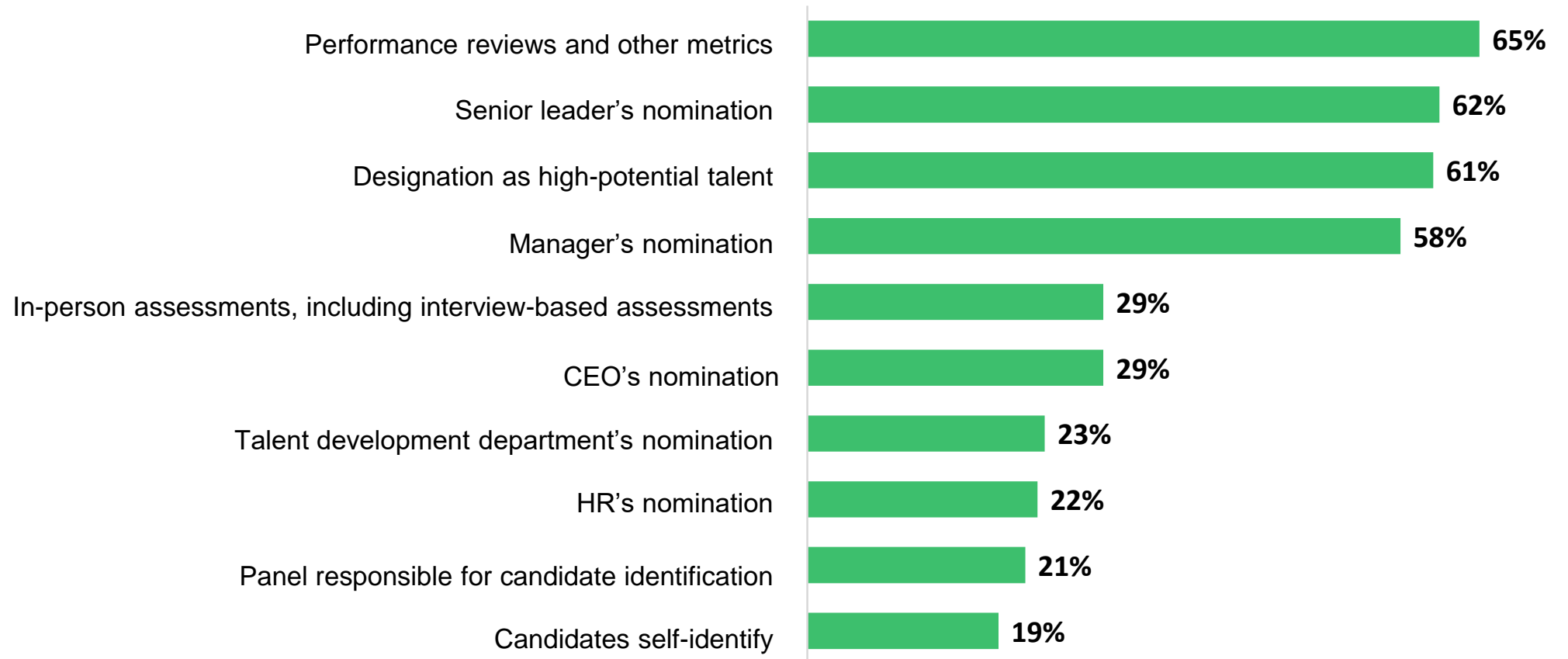
# Finding Outside Talent



Q: Where does your organization go to seek outside talent? Select all that apply.  
Segment: Organizations with a formal succession planning process



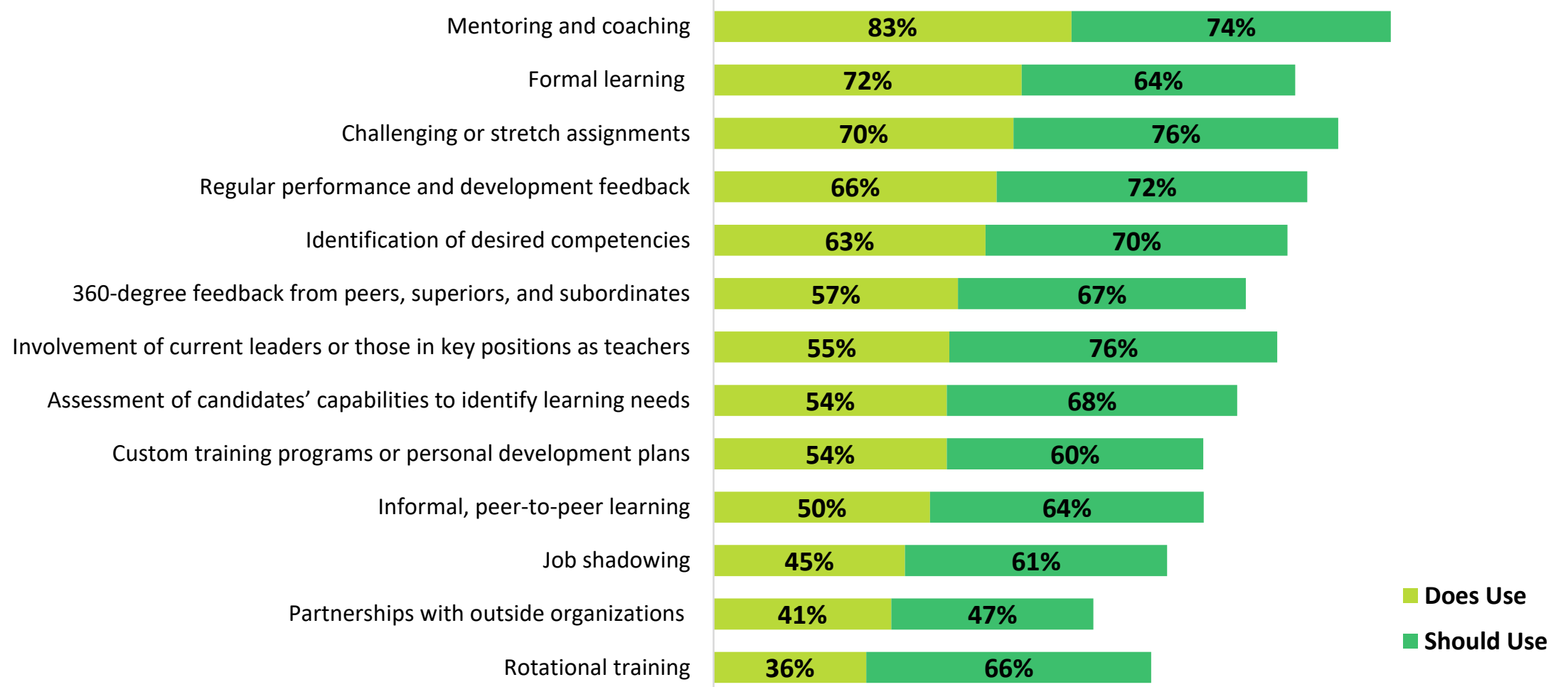
# Top 10 Methods to Identify Candidates for Succession Planning



Q: Which of the following methods does your organization use to identify candidates for succession planning? Select all that apply.  
Segment: Organizations with a formal succession planning process



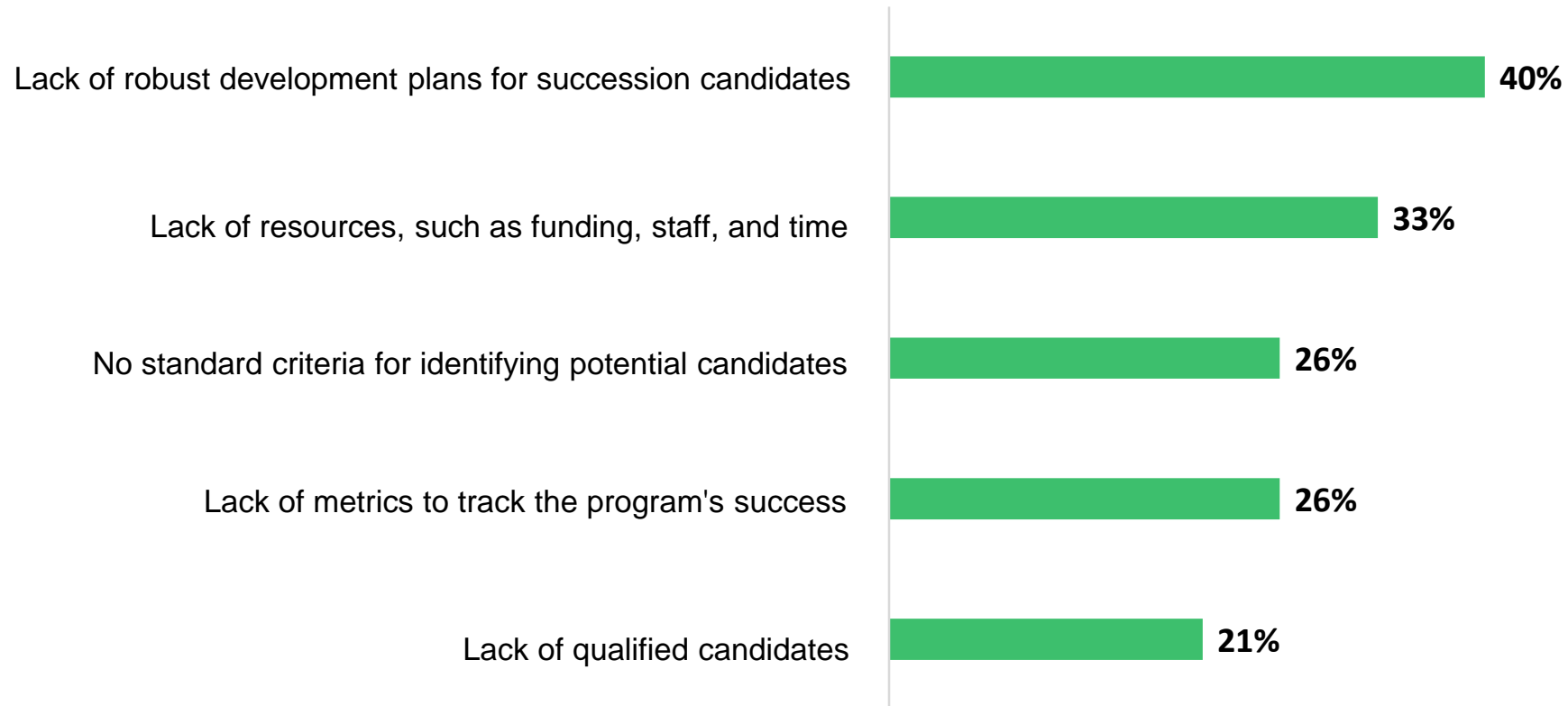
# Practices for Developing Succession Candidates



Q: When developing candidates for succession, which of the following practices does your organization use? Select all that apply.  
 Segment: Organizations with a formal succession planning process



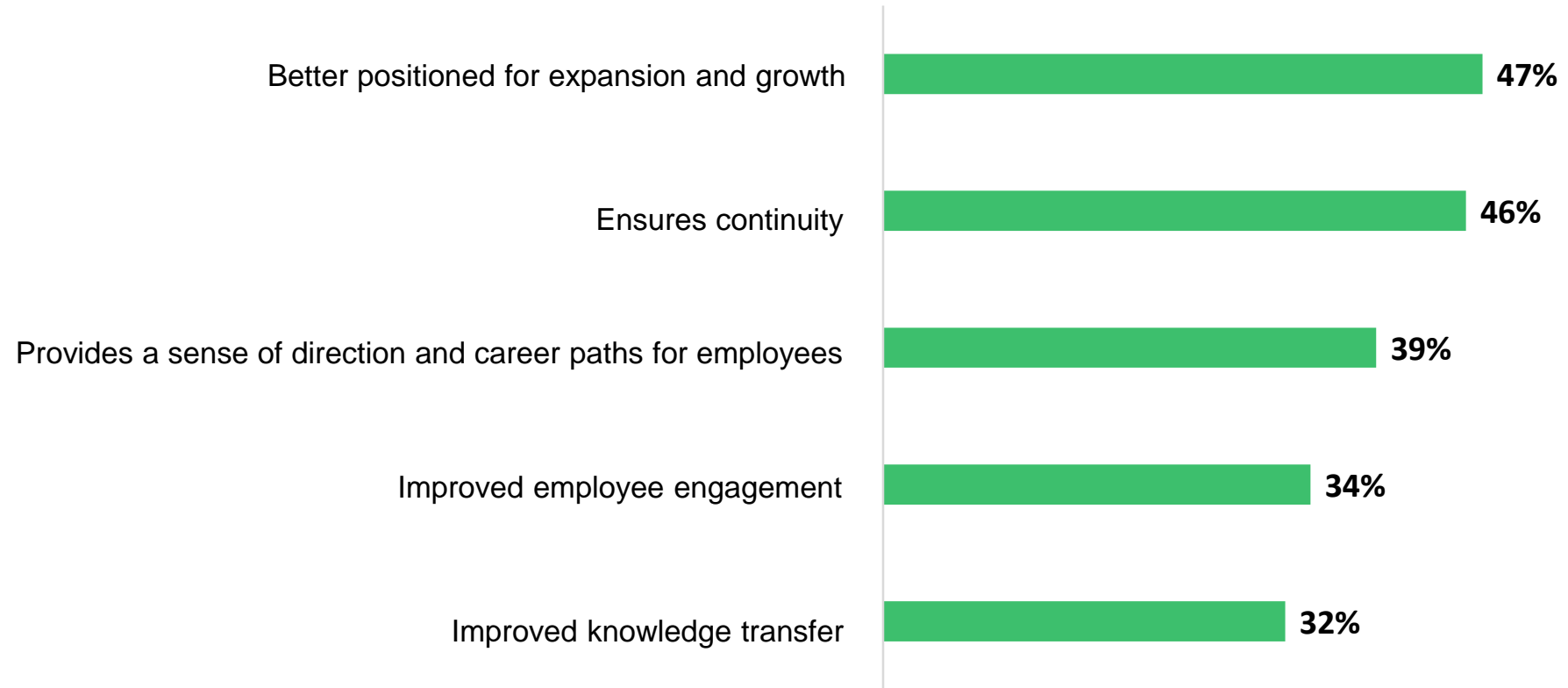
# Top 5 Challenges in Succession Planning



Q: In your experience, what are the top challenges in succession planning? Select up to three choices.  
Segment: Organizations with a formal succession planning process



# Top 5 Benefits of Succession Planning

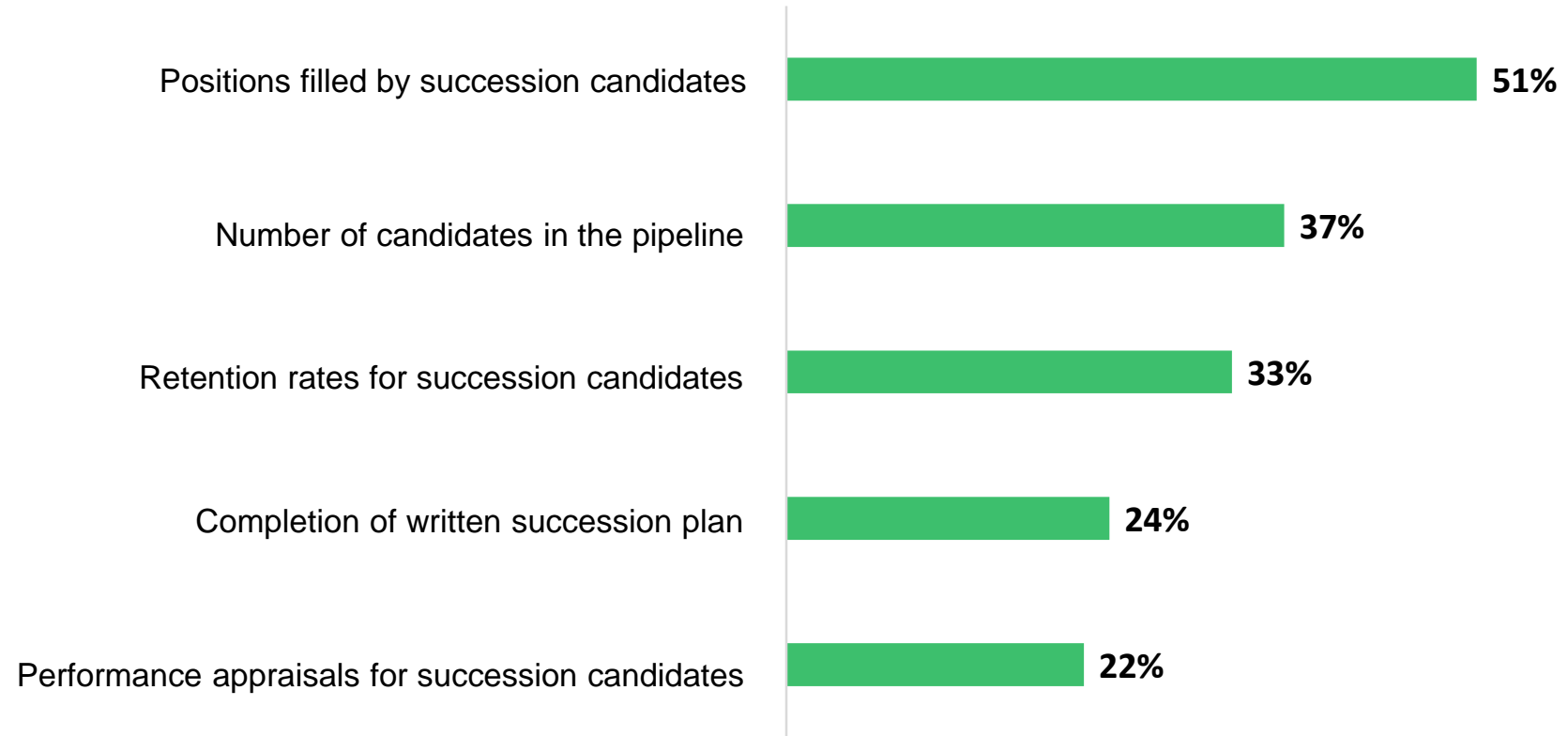


Q: In your experience, what are the top benefits of succession planning? Select up to three choices.  
Segment: Organizations with a formal succession planning process





# Top 5 Methods to Measure Succession Planning Efforts



Q: How does your organization measure the success of its succession planning efforts? Select all that apply.  
Segment: Organizations with a formal succession planning process



# Recommendations

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# Start With Urgent Needs



**Begin with positions you know are going to become vacant in the near future. Begin by asking what is going to impact your business in the next six to 12 months and develop a plan to address those needs. Identify what skills that position requires as well as any special skills anyone in the position has brought to the table.**

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*—Thomas Bux, Director of Workforce Development, Lehigh Carbon Community College*

# Select the Right Candidates

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Annette Cremo, president and owner of Performance Plus Training, Consulting, and Coaching, recommends asking the following questions when identifying potential succession candidates:

- What is your organization looking for in an emerging leader?
- Do the potential candidate's competencies match the organization's requirements?
- Does the potential candidate actually want to advance?



# Consider Your Talent Pools to Find Outside Successors

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When looking for potential successors, it's important for talent development professionals to consider using outside groups, such as:

- trade associations
- industry groups
- networking groups.



# Develop Succession Candidates



**Their managers should give them time for professional development; that can take the form of on-the-job training and mentoring, but also outside classes that can help develop the candidate. Match them with a strong and willing mentor. Make sure the mentor-mentee relationship is strong and encourage that.**

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*—Thomas Bux, Director of Workforce Development, Lehigh Carbon Community College*

# Keep It Consistent



**Provide training to prepare more succession planning meeting facilitators, and document the succession strategy, tools, talent selection criteria, and processes in communication materials that everyone in the organization uses consistently.**

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*—Doris Sims Spies, Founder, Talent Benchstrength Solutions*

# Measure the Results

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To increase the effectiveness of an organization's succession planning efforts, it's important to measure the results whenever possible, particularly using the follow methods:

- number of positions filled by succession candidates
- number of candidates in the succession pipeline
- retention rates of succession candidates.





## Additional References

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## Additional References

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