



ATD Training Basics Series

2nd Edition

Succession  
Planning  
**BASICS**

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Christee Gabour Atwood

2nd Edition

Succession  
Planning  
**BASICS**

Christee Gabour Atwood

**atd**  
PRESS

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# About the Training Basics Series

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ATD's Training Basics series recognizes and, in some ways, celebrates the fast-paced, ever-changing reality of organizations today. Jobs, roles, and expectations change quickly. One day you might be a network administrator or a process line manager, and the next day you might be asked to train 50 employees in basic computer skills or to instruct line workers in quality processes.

Where do you turn for help? The ATD Training Basics series is designed to be your one-stop solution. The series takes a minimalist approach to your learning curve dilemma and presents only the information you need to be successful. Each book in the series guides you through key aspects of training: giving presentations, making the transition to the role of trainer, designing and delivering training, and evaluating training. The books in the series also include some advanced skills, such as performance and basic business proficiencies.

The ATD Training Basics series is the perfect tool for training and performance professionals looking for easy-to-understand materials that will prepare nontrainers to take on a training role. In addition, this series is the perfect reference tool for any trainer's bookshelf and a quick way to hone your existing skills.



# Preface

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When I teamed up with ATD to write the first edition of *Succession Planning Basics* in 2007, the challenges were different from those of today's succession planning efforts.

In 2007, most interested parties thought succession planning was a way of handing down their family farms. The companies I interviewed about succession planning thought it was a good concept, but usually followed up by saying that it wasn't something they were working on at the time.

Fast forward a dozen years. Everyone knows what succession planning is now. Everyone agrees that it's important. And still a large number of organizations say it's not something they have time to work on.

However, more organizations are discovering that succession planning has even more importance than they realized in the past. While companies fight to attract and retain talent, succession planning—with its concept that the job one is being hired for is a starting point, not a permanent position—has become a vital tool to attract the best hires.

In this updated second edition of *Succession Planning Basics*, we'll walk through the steps of succession planning, study recent developments, share best practices, and help you develop a plan for making succession planning a part of your organization's benefits to attract new employees and retain and develop current team members.

## Who Should Read This Book?

This book addresses the basic concepts and steps to create a succession plan for an organization. It will serve several audiences:

- management team members who are considering succession planning for their organizations
- organization development professionals at the beginning of their careers

- human resources professionals who want to move away from the practice of replacement hiring
- trainers who need a basic understanding of succession planning for employee development plans.

*Succession Planning Basics* offers theory, processes, best practices, and other considerations that organizations need to understand before embarking on a succession planning project.

## How This Book Is Organized

This book will guide you through the process of succession planning for your organization, beginning with the core components of an effective plan. It progresses through the assessment of the organization, guidelines for each stage of the process, maintenance, possible challenges, and ongoing evaluation and improvement of the plan. The chapters will cover:

**What Is Succession Planning?** This introductory chapter includes definitions, basic steps, models, and core concepts of the process. Additionally, it outlines the opportunities and needs met by effective succession planning and offers a template for communicating the basics of succession planning to the leadership of your organization.

**Preparing for Succession Planning.** In this chapter you'll find methods to set your plan up for success by creating a strong project team that understands the goals and outcomes expected. You'll also learn methods to involve different levels of the organization in order to create a positive environment for this plan to develop.

**Establishing and Communicating Goals.** This chapter focuses on preparing team members with background information, sample materials, and recommendations for communication standards and timelines. This communication helps maintain an open, transparent process, helping build confidence in the work of the team.

**Assessing Your Organization.** Before you can determine where you're headed, you'll need to determine where you are. In this chapter, you'll study the strengths and weaknesses of your organization, organizational documents, core competencies, and key positions to be addressed. This will allow you to keep the scope of your plan manageable.

**Developing Your Workplace Profile.** The information you gathered in the previous chapter's activities will be used at this point to assess the skills that exist in the workplace, compare them to skills that are needed, and create your skills-gap analysis. From this you'll be able to create an objective picture of your organization's internal depth, or potential successors for key positions.

**Designing Your Succession Plan.** In this chapter, you'll address specifics of the succession plan, including creating job profiles, competency listings for key positions, and potential candidates and the development needed to prepare them for leadership roles. The 9-Box Grid will allow you to create an overview of the potential future leaders of your organization.

**Using Succession Planning Development Practices.** This chapter brings succession planning to the individual level as it reviews methods for creating effective individual development plans. It outlines the multitude of developmental opportunities available for competency development of talent.

**Assessing Succession Management Software.** While software solutions for succession management are constantly evolving, there are some features necessary for success. This chapter inventories the must-have features, the options, and some of the challenges that organizations have experienced to help you be a more informed buyer.

**Implementing Your Succession Plan.** This chapter outlines the six main activities of maintaining an effective plan in order to keep your succession efforts on track. Additionally, it offers a list of some of the most prevalent pitfalls that others have encountered in order to help you avoid them.

**Evaluating Your Plan.** The plan you create will need to be evaluated and revised if it is to respond to the changes that occur inside and outside your organization. This chapter offers checklists for plan evaluation, suggestions for informal evaluation methods, and recommendations for ensuring these reviews happen on a regular basis.

**Frequently Asked Questions.** The questions asked are universal. Does this guarantee a promotion? What if there's no one qualified to move up? Isn't this a job for the human resources department? This chapter gives you standard responses to some of the most-asked questions about succession planning.

**The Big Picture.** The final chapter shares best practices of organizations that have had success with their plans and some of the adjustments they've made to suit their specific needs. Since there's no such thing as a one-size-fits-all plan, these adjustments can be starter ideas for your organization. And finally, this chapter looks at the future of succession planning with Generations Y and Z moving into higher roles in the workplace. Tips to ensure that your plan is appealing to all generations add to the value of the lessons in this chapter.

## Look for These Icons

This book strives to make it easy for you to understand and apply its lessons. Icons throughout this book help you identify key points.

## What's Inside This Chapter

Each chapter opens with a summary of the topics addressed in the chapter. You can use this reference to find the areas that interest you most.



### Basic Rules

These rules cut to the chase. They represent important concepts and assumptions that form the foundation of succession planning.



### Noted

This icon calls out additional information.



### Think About This

These are helpful tips for how to use the tools and techniques presented in the chapter.

## Getting It Done

The final section of each chapter offers suggestions, additional resources, and other information to help you get your succession plan started.

## What's New in This Edition?

This book includes a closer look at tools and new developments in software that can streamline planning efforts as well as updated best practices and considerations for addressing the needs of Millennials and Generation Z when creating succession plans.

## Acknowledgments

This book represents knowledge gained from decades of work with outstanding individuals, corporations, and associations, and especially from conversations and insightful questions raised during workshops I have conducted. Thank goodness for our students. They compel us to keep learning.

Christee Gabour Atwood

July 2019

# 1

## What Is Succession Planning?



### What's Inside This Chapter

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This chapter introduces the definition and purpose of succession planning, outlining the process, identifying the opportunities it offers, and illustrating the need for this practice in organizations of all sizes.

It covers:

- the definition of succession planning
- the core concepts of succession planning
- the purpose of succession planning.

The chapter concludes with advice for creating a brief presentation about succession planning to illustrate these principles to your leadership team.

# 1

## What Is Succession Planning?

---

### Definition of Succession Planning

Succession planning is described as having the right people in the right place at the right time.

More specifically, succession planning is the ongoing process of identifying successors to the critical roles of an organization and developing them so they're ready to move into those leadership roles.

This process includes reviewing the organization's strategic plan, assessing the current workforce, forecasting future trends, and developing employees in a structured plan to replace leaders as they retire or depart from the organization.

Here's an overview of the basic steps of the succession planning process:

- Assess the organization.
- Determine key positions.
- Identify capabilities for key positions.
- Identify and assess candidates.
- Create development plans.
- Measure, monitor, report, and revise.

### Replacement Hiring Versus Succession Planning

At one time, succession planning was a term reserved for the last wills and testaments of family-owned companies. Later the term was expanded to include companies whose purpose was to plan to replace CEOs.

Today, succession planning is accepted as a best practice to replace leaders and critical key positions at various levels in organizations. However, if yours is like many organizations today, you're practicing what is known as replacement hiring. *Replacement hiring* is a reactive process to fill an immediate need, whereas *succession planning* is proactive and works to address the need before it exists.

Why would you want to practice succession planning over simple replacement hiring? Great question. Here are some reasons to consider implementing succession planning in your organization:

- Replacement hiring is a narrow approach and is usually focused on trying to quickly avoid a crisis by filling a position in a short time. Succession planning takes the additional time needed to ensure that the decision aligns with the organization's strategic plan and goals.
- Replacement hiring is more restrictive, sometimes forcing you to select the best person available at that moment. Succession planning is more flexible and allows you to focus on selecting the best candidate for the position.
- Replacement hiring is a quick fix. Succession planning exhibits a long-term commitment to the organization and to developing individuals in the organization.
- Replacement hiring is usually based on the current job description and has limited time for additional input. Succession planning allows you the time to further develop the job description to include new directions, expanded responsibilities, or other adjustments to the position.
- Replacement hiring usually centers on identifying one or two potential successors to senior-level positions, whereas succession planning focuses on developing pools of talent for key positions at various levels of the organization.
- Replacement hiring often uses input only from the incumbent and their immediate supervisor, whereas succession planning uses feedback from multiple perspectives and resources.
- Replacement hiring also may offer advancement as a reward or because of seniority with the company, whereas succession planning doesn't just consider whether a person has been in their position for a period of time long enough to merit an advancement, but rather looks at the person's abilities to ensure that they have the competencies needed to be successful in the new role.
- Because replacement hiring usually needs to be done quickly, it often doesn't allow time to consider the relationship of the hiring activity with other human resource activities, such as recruitment, training, development, and diversity initiatives. Succession planning works to integrate with other human resources activities.

And that's just a sampling of the reasons why succession planning is a good idea; it's a necessity for any organization that hopes to compete for the best talent in the workforce, to develop that talent fully, and to retain those individuals as the future leadership of the company.

## Models of Succession Planning

Succession planning is a part of workforce planning. Workforce planning involves planning for hiring and developing employees in all levels of an organization and encompasses more positions than a traditional succession plan, which focuses on leadership and key positions.

Because the emphasis on succession planning is still relatively new compared to many human resource functions, there are multiple formats and, consequently, a lack of standardization. Also, because organizations differ in their specific requirements, there will always be a need to tailor succession plans to fit the company's needs and culture.

And of course, there will always be buzzwords, new tools, and updating of succession planning practices. For the purposes of this book, we'll stick to the basics, and you can decide which enhancements you'd like to include in your specific plan.



### Basic Rule 1

Succession planning must take the place of replacement hiring in any organization that hopes to compete for and retain the best talent in the workforce.

## Succession Planning Core Concepts

There are different structures for succession planning as well as variances in the order of the steps. Differences exist in how leadership candidates are identified or nominated. However, the most successful plans share common elements that are excellent benchmarks to study before deciding on your process. Consider the following core concepts:

- To receive employee buy-in, the plan must have ongoing support from the organization's top management. That means the CEO and senior management are not only visible during the kickoff of the program, but should also take ownership of the process by continually supporting it and by presenting frequent communication about the plan's progress.
- The plan must be coordinated with the organization's strategic plan. The project team needs to understand the organization's direction so they can tailor the plan to address any new focus areas or upcoming changes in company structure.
- The best plans are developed by a team of representatives from different levels and areas of the organization. By using various representatives, you can establish a broader understanding of the organization to ensure that the plan meets the true needs of the organization, not those perceived by one specific group.



- The most successful plans use systematic methods to identify future leaders of the organization and to develop those individuals to assume leadership roles. In addition to identifying candidates, good plans use ongoing communication to ensure that the employees know what competencies they need to develop to move into leadership roles.
- The best plans are simple and are designed to answer the organization's unique needs and goals. As with most projects, if the plan is simple enough to be easily enacted, it will be used. If it's cumbersome, it may be abandoned and the organization will find itself right back at the stage of replacement hiring.

Good plans incorporate open communication methods and solicit employee input. Employees need to be able to voice concerns, opinions, and ideas and know that these are heard and considered by the planning team.

The best plans include accountability, evaluation, and follow-up measures. Many excellent plans have ended up in filing cabinets because there were no specific maintenance procedures built into the system. These plans include evaluation and revision systems to keep the process current and focused.



According to a report of the National Academy of Public Administration (NAPA), an organization chartered by Congress to improve government at all levels, workforce planning involves:

- developing a systematic process that is integrated, methodical, and ongoing
- identifying the human capital required to meet agency goals, which consists of determining the number and skills of needed workers and where and when they will be needed
- developing the strategies to meet these requirements, which involves identifying actions that must be taken to attract (and retain) the number and types of workers the agency needs.

## Variations in Succession Plans

The main differences in the types of succession planning include who determines the candidates and how many candidates are being considered for each position. Some companies allow the incumbent to choose their successor, whereas other companies use input from groups like a task force or a senior leadership team. Some organizations create separate pools of candidates for each position, whereas others create pools for all positions of the next leadership level. Each system has its own advantages and disadvantages.

These variations are also what make it difficult to present an exact timeline for your succession planning efforts. The larger the organization, the more key positions, and the more basics that must be addressed (such as updated job descriptions and identification of competencies), the longer the process will take. The least amount of time an organization can expect to use to design and implement a plan would be a year, and even then the process is not complete. In fact, with ongoing evaluation and revision, your succession plan will become an ongoing process. The good news is that this process becomes a selling point for your organization as a desirable employer.

This book will give you information on each type of plan so you can determine which one is right for your organization.

## **Purpose of Succession Planning**

Today we recognize that succession planning is not just a process to replace a CEO. It's a necessity for leadership at every level of the organization.

The purpose of succession planning is to prepare your organization for the challenges and opportunities associated with changes in critical key positions. You'll accomplish this by developing employees to ensure that you have qualified candidates ready to fill those key positions when a vacancy occurs.

The scope of succession planning can include only the senior leadership positions or it can extend to key positions across the company. Likewise, succession planning can target specific divisions of the company based on current strategic planning and the mission of the organization.

## **Succession Planning Opportunities**

If we're thinking about the big picture, it's easy to see that succession planning shouldn't be viewed as a burden but rather as an opportunity to drive the organization, instead of letting it be driven by workforce fluctuations.

Succession planning allows us to create a standard for the qualifications and competencies that future leaders need to have if they are going to take the organization into the future. It also offers senior management a structured way to review and guide the potential leadership talent in the organization.

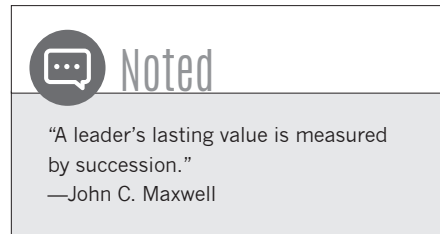
Succession planning benefits employees by improving their understanding of the potential career paths available and the development they need to move along those paths. This leads to improved retention, morale, and commitment of the workforce.

Succession planning helps us to avoid premature promotions because employees are guided in their development and prepared for their leadership roles. This prevents the problem of losing valuable talent because an employee can't handle a new role and can't face the embarrassment of having to take a step back down in position.

Because succession planning is built with the strategic plan in mind, it gives us the opportunity to identify upcoming workforce needs so we can create specific training and development opportunities based on those specific needs before they become urgent.

Succession planning is an opportunity to build on the diverse intellectual abilities and specialized skills available in a company because it identifies the knowledge, skills, and abilities of each employee as well as individual developmental interests.

And finally, succession planning allows us to move away from the reactive practice of hiring whomever is available to fill the job and into the proactive system of locating and developing the right person to realize the full potential of that position.



## Need for Succession Planning

At your next meeting, take a moment to look around the table and ask yourself a few questions:

- Is there anyone at the table who will retire in the next few years? Is there a successor prepared to step into the position?
- How many people at that table are the only ones who understand specific processes in their departments? Does production suffer when they are out of the office? What would happen if they were suddenly out of the picture?
- If anyone in that room exited the organization without giving notice, would there be a disruption of office procedures? Would valuable knowledge be lost forever?

Corporate America has seen its share of these unexpected departures in recent years, including Intel, Texas Instruments, Papa John's, Fiat Chrysler, and others whose leaders have exited quickly due to catastrophic events. How well prepared would your organization be to withstand such a loss?

These questions are the basis for succession planning. Succession planning allows time to ensure that the successors to such positions have absorbed some of that expertise. This means that the organization doesn't lose ground every time someone in a key position leaves.

The time for succession planning is not when someone exits your organization. It's when a new person comes in. From the first day an employee arrives, that individual should be observed and coached to determine if they are a potential leadership candidate and to discover the areas they need to develop to fulfill that potential.

Succession planning ensures that an employee has been developed and is ready to step into a leadership role when the opportunity arises. To make that happen, critical positions are identified and then carefully analyzed to determine what competencies they require.

The cost of an employee leaving is high—not only in the loss of their skills but also in the knowledge that they acquired during their time with the organization. Effective succession planning ensures that strategies are in place for the transfer of that knowledge.

Even the changes in the workforce today underscore the need for changes in the way we do succession planning. Pew Research Center's analysis of U.S. Census Bureau data noted in 2018 that 56 million Millennials were working or looking for work. Gen Xers, at 53 million, accounted for a third of the labor force, with Baby Boomers, at 41 million, representing only a quarter of the total. And now Gen Z is moving into its place in that workforce.

With statistics like these, coupled with the fact that businesses are realizing that Generations Y and Z value the ability to develop and drive their own careers, recruiting and retaining leaders is gaining even more importance.

One of the best ways to keep talented people is to provide them with growth opportunities that they might otherwise look for elsewhere. Succession planning answers that need.

## Summary

Creating a career map and implementing a succession plan is no easy task. And it's going to meet resistance and fall by the wayside if you haven't created the right foundation by including positive communication and two-way discussions with employees.

Succession planning is an opportunity for employees to develop their own plans for the future. They can create their own destiny. It is not a way to determine which employees should stay and which ones should go; that's performance management. And that's one of the messages that bears repeating to those who will be affected by this process.

In summary, succession planning involves the steps of analyzing an organization, determining what exists in its current workforce and what it needs, and then implementing the systems to develop potential leaders to fulfill those needs. The methods to get there will vary

to suit different companies, but the end result is the same. It creates an organization that is stronger as a whole and individuals who are motivated and prepared to face their roles as future leaders.

## Getting It Done

This week your goal is to begin educating your organization about succession planning and the benefits it can have for the company and everyone in it.

To do this effectively, you'll want to take time to highlight key information in this chapter and create a short presentation about succession planning. Be sure to include a definition, the difference between succession planning and replacement hiring, and the core concepts.

Present this information to the leadership team. Invite them to think about people in their departments who may be retiring, moving up, or leaving. Ask if they have ideas about who would replace them. Continue to share information with others by giving sheets with bullet points to managers for presentation at department meetings, in email reports, or newsletters.

Create your own *elevator speech* with a 30-second definition of succession planning and why it's important to your organization. Then share it with others at every opportunity. This stage of information sharing not only encourages others to get on board but also will pave the way for the next step of creating a succession planning team.

## Sample Introduction for Leadership Team

Imagine that three of you in this room won the lottery and decided not to come to work tomorrow. Do you think our organization would suffer? Would we lose institutional knowledge and wisdom that has helped this company get to the level of success it has achieved?

That's what we're risking when we ignore the opportunity to create a succession plan for key roles such as yours. We hear time and time again that true leaders are the ones who set up the organization for success, even after they are gone. This is our chance to prove that.

I'm asking for your support of a succession planning effort that will identify key roles and the skills needed for them, assess if we have enough of those skills in our organization, and begin a plan to develop our future leaders.



Noted

An elevator speech is a brief overview of a project. It's based on the principle that a message should be condensed so it can be delivered in no more than the time it takes for an average elevator ride (30–60 seconds).

With this plan, we ensure that the organization continues to build on the foundation you've created and that those in our ranks who understand our workplace have the opportunity to continue your work.

## **Sample Elevator Speech**

Here are the basics of succession planning. We create a team to look at the key positions in our organization and determine the skills needed for those roles. Then we examine whether we have potential candidates in our ranks to fill those roles when they become open. We create plans for these internal candidates to develop those skills. And we monitor and adjust this plan to ensure that we are always developing our workforce to be the leaders of tomorrow. I'm asking for your support in this effort so we can continue to build on the foundation our leadership has created.

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## About the Author

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Christee Gabour Atwood is a speaker, trainer, and consultant who specializes in helping companies share knowledge and develop the skills of the members of their organizations. She has worked with corporations, associations, Fortune 500 companies, and governmental entities in analyzing, developing, and presenting programs to develop communication and leadership skills.

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