

TALENT MANAGEMENT

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Guide to Effective Succession Planning

A guide to identifying the talent in your organisation who could move into the critical roles you need to deliver your strategy.



www.igniteperformanceconsultancy.com

About Ignite Performance

Ignite Performance empower businesses to achieve success by unlocking the full potential of their people. We work with your organisation to understand the core challenges, create and embed solutions that harness the full potential of your people to deliver your strategic and operational goals.



IGNITE PERFORMANCE

**COACHING
FOR SUCCESS**

**STRATEGIC
DIRECTION**

**TALENT
MANAGEMENT**

**LEARNING
SOLUTIONS**

**EXCELLENCE IN
LEADERSHIP**

**CULTURE FOR
GROWTH**

What is Succession?

Succession planning is the process of identifying critical roles within a company and the core skills associated with those roles, and then identifying possible internal candidates to assume those jobs when incumbents leave.

Succession planning helps to ensure business continuity and performance, particularly during times of significant change.

Even when there is no identifiable successor in an organisation, succession planning can help identify the knowledge, skills and learning needed in future external candidates.

Succession planning also involves cross-training employees so that they develop the skills, company knowledge and a holistic understanding of the company to create bench strength across teams.



Tip

We learn most effectively from experience

Work with your leaders to define a list of potential assignments, tasks and projects ready for individuals to demonstrate their ability to work at the next level or within a different area. We can help co-ordinate this across your organisation. Get touch to find out more.

Why Succession Planning Matters

As succession planning is about identifying the critical roles your organisation needs to achieve its goals, it's important to understand how you would manage if one of your critical roles became vacant in order to minimise disruption to business and service delivery.

The impact of carrying vacant critical roles can place significant strain upon the organisation and may impede the achievement of your goals, whether that be to generate income and profit, deliver a consistently great service or maintain employee engagement.



Succession planning is also key to retaining a skilled workforce as it fosters greater commitment where employees can see how they can progress and develop, and therefore the great talent you have recruited and invested in will remain with you and be engaged to deliver to your organisation's goals.



**You can reduce your recruitment costs and save management time by retaining your great talent
That's where succession planning comes in.**

Succession Planning Map at a Glance

The key steps to creating a tangible succession plan for your organisation are shown in the illustration below and each are explored further throughout this guide.



How to implement Succession Planning

You may think that succession planning is complex and for large organisations; in fact, succession planning is easier than you think, and helps you achieve your objectives and goals.

There are many succession planning models and approaches that have been used over the years, all of which have their place and effectiveness in the right environment.

What matters is having an approach that will best deliver to your unique organisation's needs.

01 Critical Role Definition



The first step is to define what your critical roles are, these may be senior leadership roles but not necessarily exclusively as you may have specialist roles across the organisation that are critical to enable operational delivery.

Once you know your critical roles you can start to consider the people in your workforce who may have the potential to become a successor in the event of a critical role becoming vacant.

02 Talent Mapping

The next step in creating your succession plan requires you to map the talent, your workforce, to understand where each person in the roles you are focusing on is a) currently performing and b) how much potential for development and progression they have.



The basis of any succession planning approach should look to measure 3 key factors:

Talent Potential

Assessing the potential of employees to develop and grow in the future

Talent Performance

Assessing the employees current performance contribution now

Talent Desire

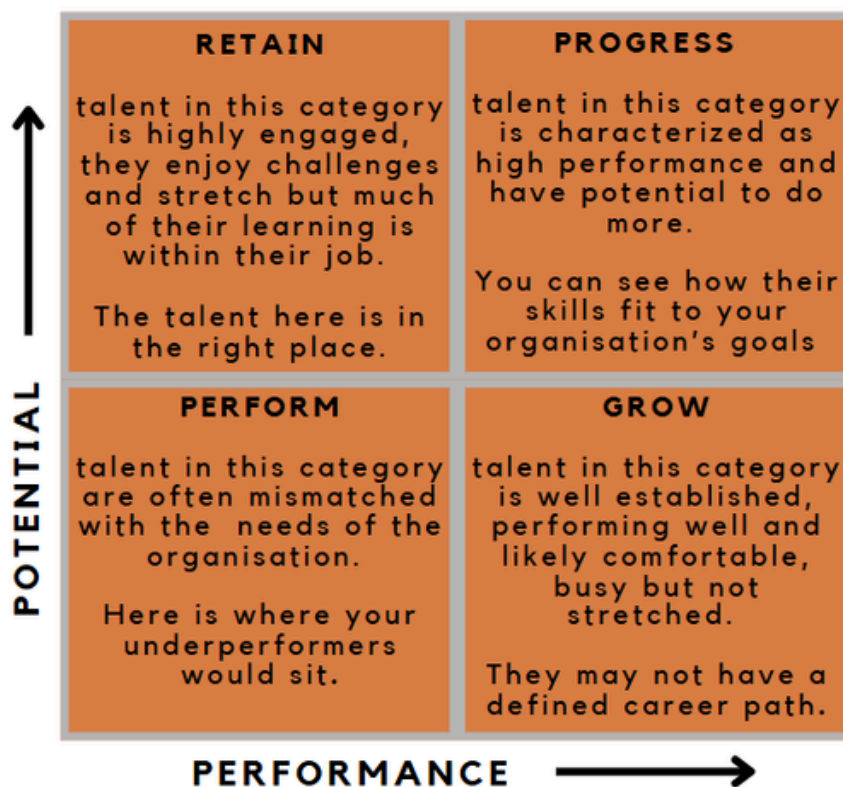
Understanding how an employee wishes to progress, to what level

02 Talent Mapping

Ensure that any successors identified are committed, are delivering to both what you are asking of them and are doing so in the right way by demonstrating the required behaviours.

You then need to be confident that they have the potential to succeed in a critical role and importantly, they want to do it.

An easy way to consider talent potential is mapping your people into the four talent categories. Those with the most potential being in the top 2 boxes, the highest performers sitting in the right-hand box



It is the people in Retain and Progress categories that should be the successors to your critical roles.

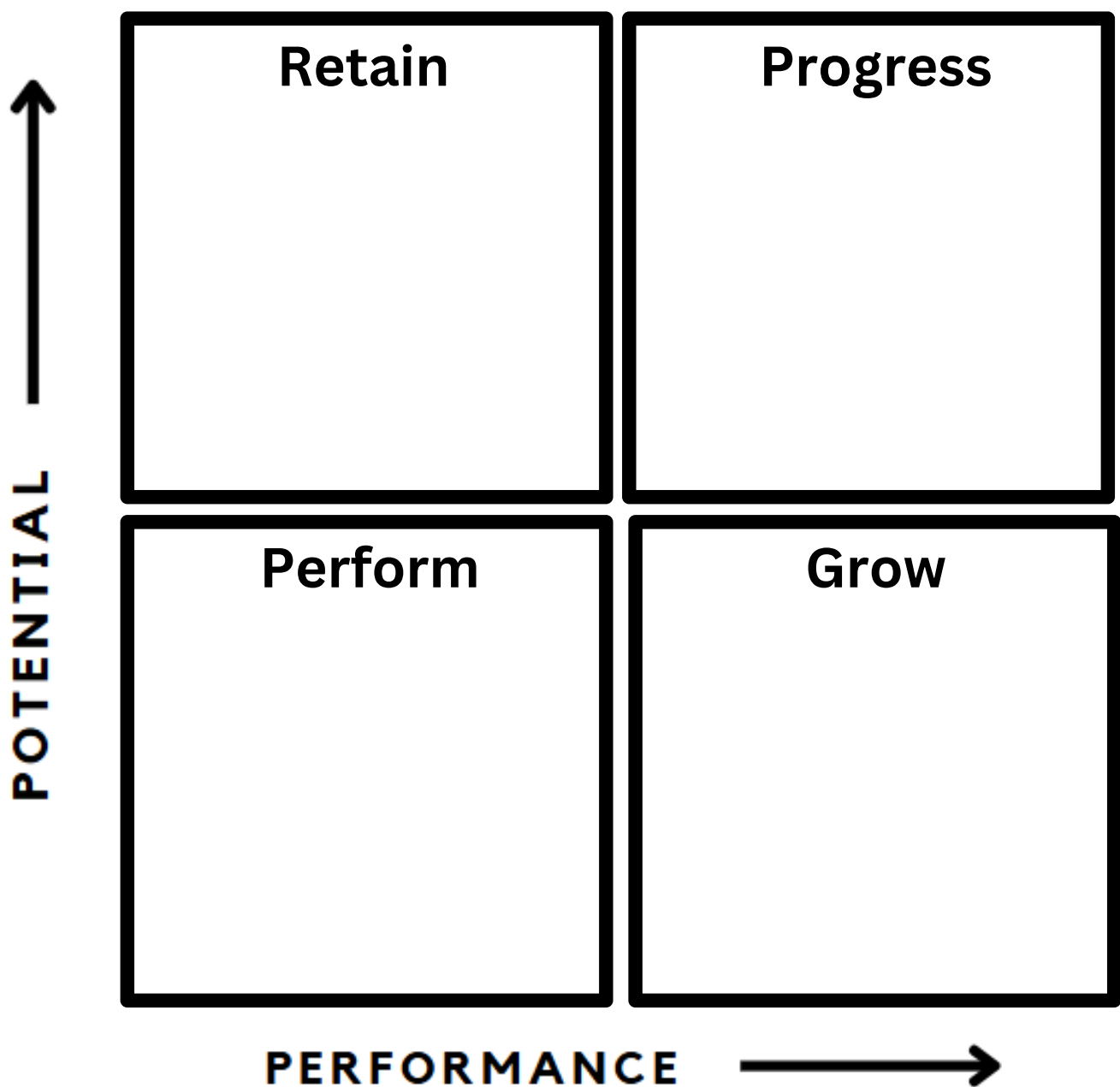
Focus here first to ensure you have a succession plan.

Those mapped to the Perform category should form part of your focus too, however this is more about how you will move them from where they are today to becoming solid performers and consistent contributors.

02 Talent Mapping Template



Use this template to map where your existing teams sit. You could use this to facilitate a workshop with leaders or to support a one on one discussion on team succession.



03 Career Conversations



Once you have completed the desktop exercise of mapping your existing talent into one of the 4 categories, it is important to discuss their career development aspirations with those individuals within the 'Progress' box

A great time to focus on succession and development is as part of a formal performance review such as an annual appraisal. It can seamlessly flow from reviewing the past performance and behaviour from the year just passed into mapping a personal development plan and exploring career progression opportunities for the year ahead.



03 Career Conversations

The outcome of such conversations should help to shape objectives to be achieved for the year ahead, aligning to both what the employee needs to deliver in their current role and what areas of development or experience they will need to undertake to become ready to move into the future role(s) mapped to them.

A succession plan can only be effective if the people identified as successors are willing to move into a critical role. This needs to be discussed and agreed with them.

Find out about Ignite Performance Consultancy's proven approach to preparing talent to step into one or more critical role. [Click here to find out more.](https://www.igniteperformanceconsultancy.com)

04 Development Actions

GAINING EXPERIENCE

A common challenge faced by those seeking to develop into a future role is gaining the experience required to demonstrate they are capable for what their future role requires, whilst still needing to deliver to their existing role.



There is no doubt that experience matters and will help your talent to become ready for their next move; for this reason, your succession plan should have **experience** at the heart and enable the employee to work through a range of relevant organisational challenges.

There are some simple steps you can take to make this more accessible such as:



Projects

Enabling developing talent to hold a key role or lead a relevant project is a great way for them to gain experience and demonstrate how they can navigate challenges, whilst having the safety and assurance of a leader or project sponsor for coaching or mentoring.

04 Development Actions



Assuming line management of others

If an individual is not experienced in leading or managing others, a great introduction can be to move the reporting line for one or two people in a team to them. This then allows for learning by experience without being overloaded. It is vital that they receive the right development from the organisation and are fully supported by their line manager.



Sideways step

In some cases to gain real life experience it may be beneficial for people to move into a role that is the same level as them but in a different specialism, team or department. This can be a great way to gain a fuller understanding of other critical roles and demonstrate how they can add value in various ways. This is particularly true if their succession plan sees them moving from a single function role into a role that manages or leads multiple functions.

04 Development Actions

TRANSITIONING TO MANAGING OR LEADING

There are four key points of transition in terms of career progression as people move into management and leadership roles, these are:

The skills and experience acquired in people's career journeys so far, that have led to their high potential may no longer, on their own, be enough to take them to the next stage of their career.

Team Managaer



Moving from managing self to managing others

Business Manager



Becoming a manager of other managers

Leader



Leading a function or department to deliver strategic direction

Business Leader



Leading the strategic direction of all or part of the organisation

04 Development Actions

The most challenging transition points are:

1

Moving into management (the Team Manager), the requirement to manage others means letting go of being a good individual contributor and moving to delivering results through others.

2

Moving from Leader to Business Leader, where the comfort of operating in 'their' function must be left behind and instead shift focus to addressing challenges across functions, giving equal attention to all. This is where a move from transactional to a more strategic leadership style is required.

Given the potential challenges for individuals transitioning at these two points, careful consideration should be given to ensure successors are truly ready and what actions your organisation can take to prepare them.

The core skills and behaviours required for the two transition points are quite different, yet critical and for this to work effectively. The move to managing others for example should focus on developing people skills whereas the move to Business Leader should focus on the bigger picture and ability to lead others rather than be a subject matter expert.

05 Populate Succession Plan

The impact of organisational culture on succession



The culture of the organisation will directly impact the effectiveness of any succession planning, for this to be truly effective the right leadership development plan needs to be in place to prepare future managers and leaders for each stage of their career journey.

In having a well-defined leadership development approach, the organisation will be more resilient and set up to achieve its goals no matter what the challenges are; furthermore your people will have clear sight of the progression opportunities available to them, creating a deeper emotional connection that cements their loyalty.



Creating a Climate for Success

Organisations will attract and retain the best talent where they are able to show tangible opportunities for career growth, therefore creating a climate where your people are enabled and empowered to develop allows you to showcase this to help attract the right talent to your organisation.

To learn more about how Insights Discovery can help to develop your leadership teams take a look at: [Transformational Leadership](#).

8 Dimensions of Leadership

Insights Transformational Leadership Model is a multi-dimensional approach to developing leaders, helping them make dramatic and sustainable improvements to their effectiveness, at the individual, team and organisational level.

