

## **Stumbling blocks to Succession Planning can be overcome**

Succession Planning is a critical activity for organizations wanting to plan for the future, and provides a valuable way to prove there are career paths available to those with talent and who are committed to the organization. In fact, Brian Wilkerson, national practice director for talent management at Watson Wyatt in the US has said that “When you think about it, succession planning is one of the most critical aspects of talent management. Companies that have a strong programme in place are ensuring a stable future for themselves.” Succession planning is imperative for organisations keen to avoid reliance on the vagaries of the employment market for future key roles and eager to avoid the costs and disruptions of employing external candidates. Despite these obvious benefits, my experience is that this is not enough to ensure that succession planning is achieved.

Having developed, implemented and reviewed a number of succession planning programmes, I have observed several stumbling blocks not necessarily addressed in the usual texts and articles about the topic. These are not problems with data assessment, collection and analysis (although that can be trying enough!), nor with setting up development plans or implementing them. The biggest stumbling blocks seem to be the human, often political, factors that arise at all stages of a succession planning process.

Because these issues can cause the most robust and well thought-out plans to be stymied, I have written an e-guide about Succession Planning called ‘Everything You Ever Wanted to Know About Succession Planning’ that not only explains the steps and tasks involved, but includes the traps, issues and problems you may encounter within the organization at each step and some ways to manage these. This guide offers a practitioner’s perspective on the topic and allows the reader to be ‘forewarned’ and forearmed’.

For example, even though it is relatively easy to persuade an executive that Succession Planning is a good idea - simply a strategic intention to be around and successful in a decade’s time gets Succession Planning onto the agenda - human problems can present when deciding which roles are ‘key’ for succession purposes and therefore should have successors developed to step into them. At this point human emotions enter the fray. These can go several different ways.

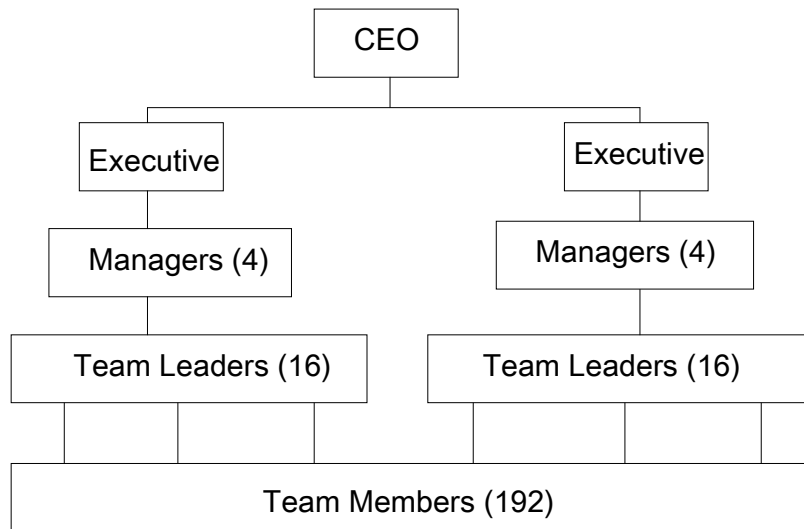
Most executives will have a clear idea immediately as to which roles are key – from their own current perspective. However they may not be key from an organizational perspective. For example, I once had a manager approach me after a meeting where key roles for a succession programme had been discussed. He was most anxious to ensure that his Personal Assistant (PA) was included as a key role. I asked him why he thought his PA role should be included. His answer was: “She is absolutely critical to my functioning well as a manager. She is so important that I would rather a team leader was away than my PA.” I can understand that a PA may be critical to an individual but this type of role is unlikely to be

a key role for succession planning purposes. PA roles tend to be generic across organizations and can fairly easily be recruited externally or even filled with a contractor, and they rarely contribute strategically to the organization (unless your core business is providing PA services perhaps). By developing some criteria to define your key roles, it reduces arguments or emotional decisions about which roles fit and helps everyone understand what a key role is.

Some people will relate a role being key for succession purposes, to the value put on the role generally, and the role-holder in particular. This can result in everyone wanting their role to be included as a key role. It can also create major political issues if only some of a particular group of roles are deemed key. For instance, if 5 out of 6 Level 3 management roles are deemed key for succession. While the purists might argue that only the 5 fitting your criteria should be included, for the sake of expediting, rather than derailing, the succession planning process, all 6 should go in.

Another practical issue arises when too many roles are allowed into the programme and that is the strain it can put on your resourcing. For example, let's take a look at how including large numbers can exponentially increase your resourcing.

Here is an organisational chart with one CEO, 2 Executive team, 8 managers 32 team leaders and 192 staff.



This is quite a small organisation, so let's imagine how succession planning could work. Let's firstly say that we are going to select both the Executive roles as key roles for succession planning. The most likely successors to those roles will come from the manager level below. So that is 8 people who may wish to be considered. If all 8 are interested, then assessments of some kind need to be undertaken with those 8. Let's say half of those managers are suitable to enter the development programme. That is 4

managers who will need to be developed, mentored and their development monitored. Not too onerous, right?

Secondly, let's say that we are going to make all the team leader roles key roles for succession planning. This time the potential successor pool is 192 staff. Let's say just 1/3 of those indicate an interest. That's 64 people that will need to be assessed in some way to determine if they are suitable to be successors. Let's imagine that of that 64, again half are suitable for development. That's 32 people who will need to be developed, mentored, and their development monitored – using conservative figures. You may have more. Now it is getting quite resource intensive. Can you see the problem?

The more roles that creep into the succession planning process, the more your resourcing at each stage is multiplied. By ensuring clarity about the goals of your programme, your key roles, phasing in your programme and ensuring everyone understands the costs and benefits, you can avoid overloading your resources.

Another human issue that arises here is how to communicate with those people who have indicated an interest in participating in the programme, but whom you have assessed as not being suitable at this time. Particularly if these people are already on a career path within your organisation, ie they are above a team member level, this can have adverse consequences if not managed well.

For others, having their role selected as a key role for succession planning can instill a sense of insecurity and even fear. The idea that others are being developed to fill their shoes can be very threatening. When holders of key roles are feeling like this, they are unlikely to co-operate with the process, let alone act as mentors or trainers for the potential successors. It is essential to have strategies in place to eliminate or at the least, minimize this problem, because to truly develop successors to step seamlessly into key roles, the co-operation and support of those role-holders can be crucial.

For each stage of the succession planning process these types of emotional and political issues can arise. The credibility of the programme sometimes rests not on the capability to identify and develop successors (although this can be fraught with dilemmas too) but rather the ability to navigate the human factors successfully and address likely issues and concerns before they impact the programme. There are a range of software solutions to help practitioners manage the information that is collected, analysed and reported on as part of managing succession but software cannot manage the reactions and agendas of the individual's impacted by it. Given the huge benefits of developing your existing talent to step into key roles in the future, it is critical to gain an understanding of how to manage these human issues, as much as the technical aspects of succession planning.

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**Jenni is an Organisational Developer with a special interest in strategy, strategic thinking, talent management and leadership. She considers the development of talented people for future key roles to be critical for any organisation that achieves its vision through its people. Jenni has developed and managed a number of succession planning programmes and is also the originator of the concept of a 'Strategically Savvy' competency for people working within organisations. Find out more about her at [www.strategies-direct.com](http://www.strategies-direct.com)**