

## **Leadership Barometer 166 Successful Succession** **Robert T. Whipple, MBA CPTD**



Succession planning, if done well, will provide an endless stream of fresh and vital talent. It will help any organization have continuity of excellent performance despite the vicissitudes of outward factors. Neglected succession planning will lead to spotty performance over time and frustration on many levels. Let's take a look at some key observations and concepts about succession planning.

### **Succession is most important at the top**

The need for good succession planning increases at the higher levels in any organization. Shop floor people only need minimal training on functions to become effective. Groom CEOs well on all the policies and nuances of running the organization before taking over.

There should be a specific succession planning process for all key jobs in any organization. Specify who is ready to step in immediately and who is learning for future roles. The obvious reason is that we never know when someone will leave for one reason or another. The transition may take place over years or as abruptly as a few hours, depending on circumstances.

### **An example from my past**

I remember one transition where my organization doubled in size. The previous manager and I had exactly 5 minutes for him to cross-train me before he left. He showed me where the personnel files were, gave me the keys to the office, and that was it.

Actually, the transition worked out pretty well. He did not have time to color my thinking about individuals or processes. I started out by building my own knowledge base.

### **Succession is broader than we think**

The activities of succession planning are much broader than most people realize. It starts with general cross-training for bench strength. Also include identifying high potential people for future roles, mentoring, and even job

rotation. In fact, at the higher levels of leadership, the majority of daily activities are part of the succession process.

### **Make succession a conscious and continuous effort**

Good succession planning takes a lot of time and energy. The process should go on at a conscious level nearly every day. It is often a hidden process that the rank and file do not understand. They only see the result.

When Jack leaves, we realize that Ann is fully capable of replacing him. It often takes on a political feel, since not everyone can be involved in many of the discussions. It can cause a lot of anxiety in organizations, so the best approaches are as transparent as possible. The anxiety occurs because people recognize there are posturing discussions frequently. Most of the discussions are private, so people feel nervous about the unknown.

### **Sometimes succession has a low priority**

It is too bad that succession planning takes a back burner in many organizations. This is true for several reasons:

- Overburdened leaders have little time to think about long-term development.
- There is a fear of setting up an implied competition and tension between contenders.
- People may interpret succession discussions as meaning the incumbent is trying to leave early. This could imply a lack of commitment.
- External replacement versus internal promotions can demoralize understudies.
- Succession is a highly emotional topic. People get nervous.

### **Advice from an expert**

William Rothwell of Penn State is one of the recognized experts in Succession Planning. He suggested there are at least 10 key steps that need to be included in any succession planning process:

1. Clarify expectations for Succession
2. Have competency models
3. Conduct individual assessments
4. Create a performance management system
5. Assess individual potential
6. Create development process
7. Institute Individual development plans
8. Keep a talent inventory
9. Establish accountability for making the system work.

## 10. Evaluate the results.

Rothwell also gave us a list of 6 of the biggest mistakes in succession planning:

1. Assuming success at one level will guarantee success at a higher level.
2. Thinking bosses are the best judge of who to promote.
3. Considering promotions as entitlements.
4. Trying to do too much too fast.
5. Giving no thought to what to call it.
6. Assuming that everyone wants a promotion.

## **Conclusion**

The best approach is to have a formal succession process for all professional jobs in an organization. Let people know what it is. Make it a daily focus instead of something managers think about only when someone is leaving. I believe succession is a fundamental leadership process. The highest calling for any leader is to grow other leaders.

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