SUCCESSION PLANNING

Action Steps

Succession planning is the process of identifying, evaluating, developing, and tracking high-potential employees who are capable of moving into different positions in the company that result from planned and unplanned job openings due to turnover, promotion, or business growth. (From Noe, R.A., 2018, *Employee Training and Development,* McGraw Hill)

ACTION STEP: Define Roles

Before you can plan to fill a leadership role, you need to understand what is done in the role and the skills needed to do it. You can:

- Update job descriptions
- Create standards of work
- Capture institutional knowledge through tutorials and systems
- Identify the knowledge, skills, and abilities (in a document called a job specification) needed to do this job well

ACTION STEP: Develop High-Potential Employees

Use your current training and development resources or implement new programs to specifically prepare employees for promotion. You can:

- Implement 1:1 coaching
- Establish a mentoring program
- Send employees to external soft skills training
- Encourage job shadowing and cross-training to show employees the big picture
- Send employees to leadership workshops
- Use stretch assignments

ACTION STEP: Seek External Applicants

Promotions from within can be beneficial, but roles can be filled from outside. You can:

- Refer to job descriptions, statements of work, and job specifications when analyzing external applicants
- Establish job shadowing and mentoring (including reverse mentoring) as part of onboarding for a new external hire

### ACTION STEP: Identify High-Potential Employees

Use a variety of ways to determine who within your organization might take on a new position with some development. You can:

- Review performance appraisal results to search for needed capabilities
- Engage in career discussions to learn which employees want to move up
- Allow employees to self-identify, so as not to overlook non-traditional applicants

ACTION STEP: Make Roles More Attractive

If roles are going unfilled because the job isn't attractive, you can:

- Create a career path so that employees can see where the job fits in a series of possible promotions
- Experiment with more flexibility (e.g., flexible hours, hybrid work, rotating on-call requirements)
- Simplify the job by removing and reassigning duties or increasing delegation
- Invest in current leaders to model the way and improve overall leadership skills in the organization
- Cultivate positive organizational culture by enacting fairness, emphasizing transparency, and improving internal communication
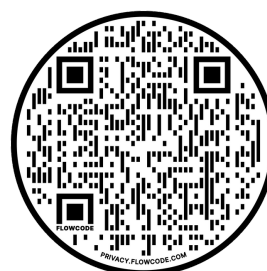
Scan with your phone's camera to get resources from Dickerson Consulting

SUCCESSION PLANNING

Resources

DEFINE ROLES
Job Descriptions and Specifications:
https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/performingjobanalysis.aspx
Standards of Work:
https://www.saskhealthquality.ca/blog/what-are-work-standards-and-how-can-they-build-a-foundation-for-improvement/
Capturing Institutional Knowledge:
https://whatfix.com/blog/institutional-knowledge/

IDENTIFY HIGH-POTENTIAL EMPLOYEES
Identifying High Potential Employees:
https://www.zenefits.com/workest/how-to-identify-and-keep-a-high-potential-employee/
Performance Management and Appraisal Best Practices:
https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/managing-employee-performance.aspx

DEVELOP HIGH-POTENTIAL EMPLOYEES
Coaching:
https://positivepsychology.com/workplace-coaching/
https://hbr.org/2019/11/the-leader-as-coach
Mentoring:
https://www.forbes.com/sites/iese/2022/09/26/the-five-secrets-of-the-best-mentoring-programs/?sh=62473a013869
Job Shadowing:
https://www.aihr.com/blog/job-shadowing-program/
Stretch Assignments:
https://www.sigmaassessmentsystems.com/stretch-assignments-succession-planning/

MAKE ROLES MORE ATTRACTIVE
Career Paths:
https://www.workforcehub.com/blog/create-career-paths-in-7-steps-or-lose-your-best-employees/
https://www.shrm.org/resourcesandtools/tools-and-samples/toolkits/pages/developingemployeecareerpathsandladders.aspx
Job Simplification:
https://www.aihr.com/blog/job-simplification-work-simplification/
Flexibility:
https://www.forbes.com/sites/forbescoachescouncil/2022/10/31/11-legitimate-ways-to-offer-employees-more-flexibility/?sh=1959444443e0
Leader Development Strategies:
https://builtin.com/people-management/leadership-development
Positive Organizational Culture:
https://www.indeed.com/career-advice/career-development/positive-culture

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