

# Simple Succession Planning **Guide**

SIGMA's Simple Succession Planning is a straightforward process for identifying and developing internal talent to replenish existing talent when it exits the organization.

This planning guide takes users through SIGMA's 6-stage succession cycle to: identify critical leadership roles, build leader success profiles, nominate high potential talent, assess development needs, develop talent, and measure your organization's progress. The guide provides templates for each stage.

# Is your succession plan set up for success?



Whether you believe your organization has Succession Planning under control or is woefully unprepared, the following *Succession Planning: Success Checklist* is a quick measure of the maturity level of your Succession Planning process and what areas need to be improved.

## Executive Support

- Is your Succession Planning initiative supported by your CEO?
- Is Succession supported by the entire leadership team?

## Process

- Do you use a proven Succession Process?
- Is that process easy to understand?
- Are you confident in your ability to explain the process at all levels of the organization?

## Communication

Are you consistently communicating the plan to:

- ... the board (if applicable)
- ... management?
- ... individual succession candidates?
- ... all members of the organization?
- Do you have formal conversations with leadership on their plans for retirement?
- Are leaders prepared to have candid discussions with their team regarding each candidate's readiness?
- Do leaders have the right tools to support development discussions with their successors?

## Documentation

- Is your Succession Plan formally documented?
  - Does the leadership team review the Succession Plan (at least) annually?
  - Is your Succession Plan updated (at least) annually?
- Does your Succession Plan include:
- ... detailed Success Profiles for each leadership role?
  - ... populated Succession Benches for each leadership profile?
  - ... Successor Profiles for each Succession Candidate?
  - ... Development Plans for each Succession Candidate?
  - ... Documented Metrics to gauge the success of your plan?

## Accountability

- Does your plan include detailed timelines and deliverables?
- Do you have a process in place to hold participants accountable?
- Do you have a scheduled annual review that includes your entire leadership team?

## The Long Game

- Is the Succession Plan aligned with the organization's long-term Strategic Plan?
- Is there a plan in place for multiple levels of the organization (i.e., not just the CEO)?
- Are recruitment, hiring, and talent development aligned with your Succession Plan?
- Are Success Profiles built with the future in mind?
- Are you focused on developing pools of talent for each role vs. identifying one successor?

## Your Score

- 0-10** At risk for unexpected disruptions
- 11-15** Demonstrates need for improvement
- 16-23** Solid foundation with room to grow
- 24-28** Mature plan with minor adjustments needed

Regardless of your score above, our *Succession Planning Launch Series* can help. With just two separate half-day workshops, our series delivers a comprehensive full-year implementation plan customized for each member of your executive team. Find out more [here](#).

# succession planning process



A proven Succession Planning process provides a roadmap for success. This structure ensures consistency across the organization, aides in the communication of the plan across all levels of the organization, and provides the ingredients for success.

Our Succession Planning Framework and accompanying templates on the following pages should give you a sense for what is required at each stage of the process along with some helpful tools to get you started.

## Identify Critical Roles

There is typically no shortage of need when it comes to Succession Planning. However, it is important to take a measured approach when introducing Succession Planning into an organization for the first time. With this in mind, the first step is to identify which roles your organization should target based on urgency and how critical the role is to the business.

**TOOLS/TEMPLATES: At-A-Glance Critical Roles Worksheet (p. 6)**

## Build Success Profile

Now that you've narrowed down the need to your most critical positions, we can now focus on understanding the requirements of each role. At this stage, we define the talent composition required for success by incorporating present and future needs. This step will provide the target that we'll aim for when selecting and developing future leaders.

**TOOLS/TEMPLATES: Success Profile, Leadership Skills Profile, MEIA (p. 8)**

## Nominate Successors

The Success Profile in the previous step is the lens we'll use when selecting candidates for succession. This is a stage where a formal process adds much-needed credibility and transparency to combat perceptions of favoritism.

Results from the nomination survey are used to populate a draft Succession Bench that groups successors based on their readiness and provides an 'eye-test' measure of bench strength for the incumbent's role. A well maintained Succession Bench is also a great way to measure the success of your Succession Plan.

**TOOLS/TEMPLATES: Succession Nomination Survey, Succession Bench Summary (p. 10 & 12)**

## Assess Development Needs

The nomination survey is just the first step in evaluating your bench strength. At this stage, there is an opportunity to add objectivity through scientifically validated leadership assessments. The assessments do not take the place of the candidate's history and experience, but add a unique perspective at an incredible level of depth. Any Succession Planning Process should incorporate an objective assessment to measure the talent profile of each succession candidate and to identify gaps that can be targeted through development.

**TOOLS/TEMPLATES: Succession Profile, Leadership Skills Profile, MEIA (p. 14)**

## Develop Talent

To make your succession process truly succeed, you now need to follow up on the assessment phase by creating a development plan that will help potential successors fill in the gaps in their skills and experience, and progress into readiness for their future roles. This is where the work comes in as development plans are managed for each candidate, and recommended and completed development activities are tracked. At a minimum, create a development plan for all your high-potential succession candidates. In a perfect world, you would have development plans in place for your entire Succession Bench.

**TOOLS/TEMPLATES: Development Plan, Development Activities Tracker, Executive Coaching (p. 16 & 18)**

## Measure Progress

Tracking measurable progress indicators and regularly sharing the results with key stakeholders demonstrates the value of your succession plan and keeps its importance top of mind. When you're just starting out, you might not like all the numbers, but if you set and communicate reasonable expectations from the beginning, in time you'll be able to show year-over-year progress.

Get started today by looking at what you can easily measure now and gathering those numbers. Set a calendar reminder to review, compare, and communicate progress every six months. Even if you only track one metric, get in the habit of recording it, attaching a dollar value if possible, and conveying that to your stakeholders.

**TOOLS/TEMPLATES: Talent Progress Scorecard (p. 20)**

# simple succession process



<p><b>identify critical roles</b></p>	<p>Identify which roles your organization should target through its succession program.</p>	<p>At-A-Glance Org Chart</p>
<p><b>build success profiles</b></p>	<p>Describe the talent composition required for each critical role at the present time and according to your organization's future needs.</p>	<p>Success Profile Worksheet</p>
<p><b>nominate successors</b></p>	<p>Identify and select candidates for critical roles by creating a bench for each position.</p>	<p>Succession Bench Summary</p>
<p><b>assess development needs</b></p>	<p>Summarize the talent profile of each succession candidate, and identify gaps to target through development.</p>	<p>Candidate Profile Worksheet</p>
<p><b>develop talent</b></p>	<p>Outline or update development plans for each candidate, and track recommended and completed development activities.</p>	<p>Development Actions Form</p>
<p><b>measure progress</b></p>	<p>Update the scorecard, tracking various indicators of improved succession planning outcomes.</p>	<p>Talent Progress Scorecard</p>



# at-a-glance critical roles worksheet

**the goal:** identify the roles your organization should target in your succession program

- the steps:**
- list your direct reports
  - rate each direct report on:
    - readiness to move into your position
    - their plan to remain with the organization
    - the availability of replacements for their role, should the candidate leave or be promoted
  - when evaluating someone's plan to remain, consider their eligibility to retire as well as the potential risk that they will seek opportunities elsewhere
  - begin with your team, but a good succession plan will scale this exercise out to multiple teams and levels
  - print and complete one chart per critical role

# SIGMASuccession at-a-glance critical roles worksheet

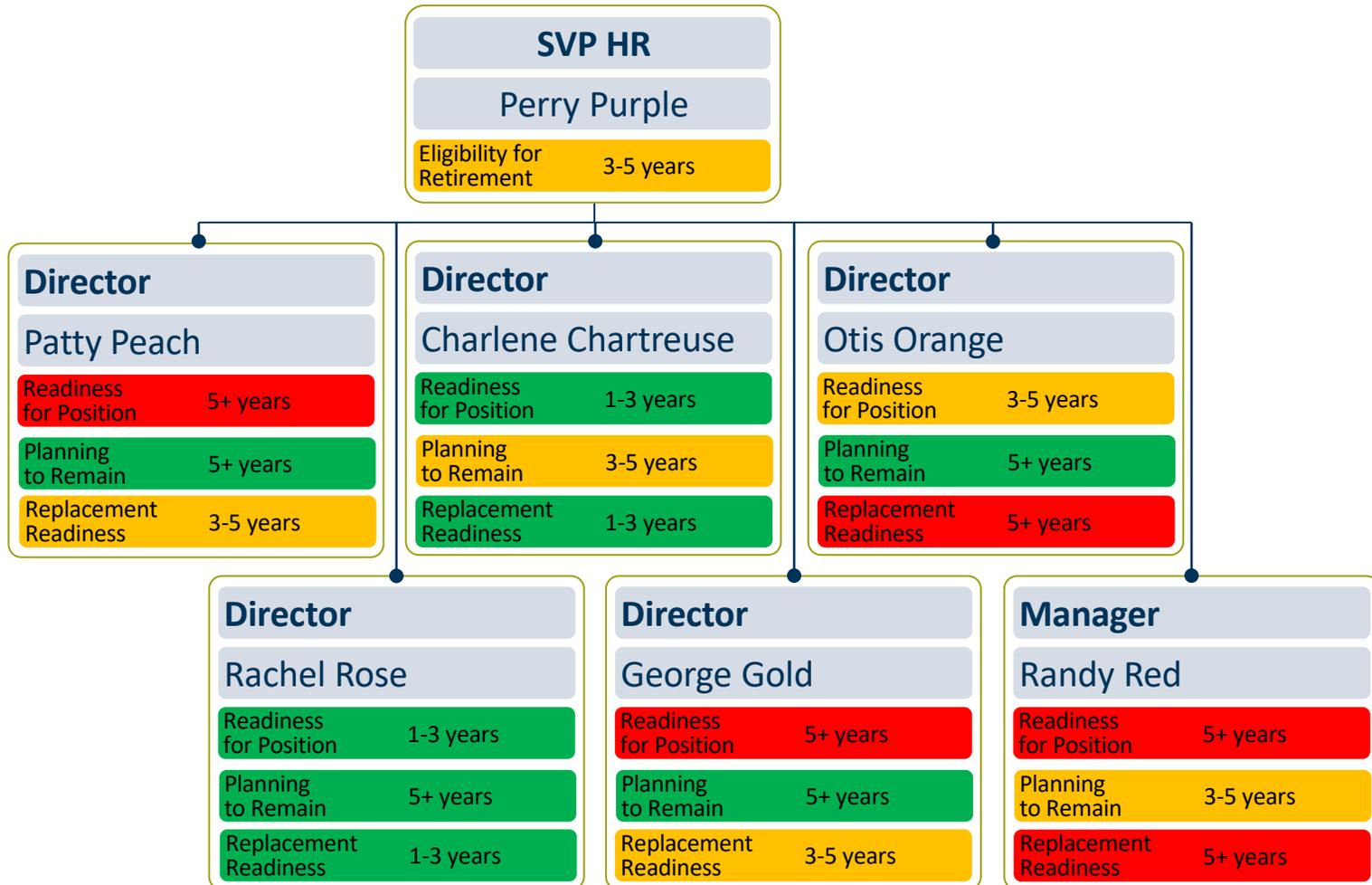


Position Name			
Position Name Readiness for Position <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+ Planning to Remain <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+ Replacement Readiness <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+	Position Name Readiness for Position <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+ Planning to Remain <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+ Replacement Readiness <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+	Position Name Readiness for Position <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+ Planning to Remain <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+ Replacement Readiness <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+	Position Name Readiness for Position <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+ Planning to Remain <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+ Replacement Readiness <input type="checkbox"/> 1-3 <input type="checkbox"/> 3-5 <input type="checkbox"/> 5+
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# sample at-a-glance critical roles worksheet



## Perry Purple SVP HR





# b

## build success profiles worksheet

### the goal:

describe the talent needed in each critical role, both now and in the future for your organization

### the steps:

- include basic demographic information on the role
- use existing job descriptions to list position criteria (e.g., education required, skills needed, and duties to be aware of)
- develop the Success Profile by considering:
  - skills commonly needed for success in the senior management team
  - anticipated future requirements for all senior leaders
  - specific characteristics needed for the focal role
  - potential skill requirements for this role in the future
  - emotional intelligence or other important personal characteristics
- use validated measures to ensure complete and accurate Success Profiles

# draft success profiles



# 2020

Succession Position	Current Incumbent	Exit Year	Urgency
			☆☆☆☆☆

**Position Demographics**

Location	
Level	
Direct Reports	

**Position Criteria**

Edu	
Exp	
Skill	
Duty	

Leadership Profile					
Competency: Senior Management Team	Competency: Focal Role	Emotional Intelligence			
		SMT: Future	Focal: Future	Other: Future	

# leadership competencies



## COGNITIVE LEADERSHIP SKILLS

ANALYTICAL ORIENTATION

BUSINESS ACUMEN

Creativity

DECISIVENESS

OBJECTIVITY

Risk Taking

PRIORITIZING

Technical Orientation

Thoroughness

## PERSONAL LEADERSHIP QUALITIES

ACHIEVEMENT AND MOTIVATION

Ambition

DEPENDABILITY

DESIRE TO LEARN

EMOTIONAL CONTROL

Flexibility

Independence

INTEGRITY

OPEN-MINDEDNESS

PRODUCTIVITY

Self-Discipline

Self-Esteem

VALUING DIVERSITY

Work/Life Balance

## INTERPERSONAL LEADERSHIP SKILLS

ACTIVE LISTENING

CLIENT/CUSTOMER FOCUS

COMMUNICATION

CONFLICT MANAGEMENT

First Impression

Formal Presentation

INTERPERSONAL RELATIONS

Negotiation

OPERATING UPWARDS

Persuasiveness

SENSITIVITY

Social Astuteness

## SENIOR LEADERSHIP SKILLS

Assuming Responsibility

Attracting Staff

Delegation

DEVELOPING/COACHING OTHERS

Emphasizing Excellence

Facilitating Teamwork

Inspirational Role Model

INVOLVING DIRECT REPORTS

Monitoring and Controlling

Motivating Others

ORGANIZATIONAL SPOKESPERSON

Organizing the Work of Others

Short-Term Planning

STRATEGIC PLANNING

VISION





## succession nomination survey

**the goal:** evaluate succession candidates for each critical role

- the steps:**
- indicate name of candidate and role they are considered for
  - for each candidate, rate your confidence in their potential performance for this role
  - estimate the timeline until role readiness
  - gather ratings from multiple sources, including:
    - the current role incumbent
    - the senior management and succession advisory teams
    - leaders, peers, and direct reports of the succession candidate
  - provide additional information on the candidate in the comment box to add context to your evaluation
  - complete this survey for each potential succession candidate

# nominate succession candidates

## Succession Nomination Survey

**Position:**  
**Candidate:**

How much confidence do you have in this candidate's ability to perform effectively in this position with development in required areas?

not sufficiently acquainted

not at all confident
  slightly confident
  moderately confident
  very confident

When will this candidate be ready to fill this position?

not sufficiently acquainted

ready now
  ready 1 to 3 years
  ready 3 to 5 years
  ready 5+ years
  ready never

Please express any other comments you have, if any, about the ability of this candidate to effectively perform in this position.

**Position:**  
**Candidate:**

How much confidence do you have in this candidate's ability to perform effectively in this position with development in required areas?

not sufficiently acquainted

not at all confident
  slightly confident
  moderately confident
  very confident

When will this candidate be ready to fill this position?

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ready now
  ready 1 to 3 years
  ready 3 to 5 years
  ready 5+ years
  ready never

Please express any other comments you have, if any, about the ability of this candidate to effectively perform in this position.



# n

## succession bench worksheet

**the goal:** track readiness of succession candidates for critical roles

- the steps:**
- indicate incumbent and urgency information for position
  - list succession candidates according to three levels
    - **level A:** candidates ready for role in **less than 3 years**
    - **level B:** individuals ready for role in **3 to 5 years**
    - **level C:** potentials ready for role in **more than 5 years**
  - provide name and demographics for each candidate
  - record candidate growth with dates spent at each level
  - use the worksheet to track the overall strength of your Succession Bench, and individual candidate's progress over time



# nominate succession candidates

# 2020

Succession Position	Current Incumbent	Exit Year	Urgency	Bench Strength		
			☆☆☆☆☆	C:	B:	A:

Candidate List								
	Candidate Name		Progression to Succession Position			Succession Path		
	Last	First	Level C	Level B	Level A	Current Position	Next Position	Readiness for Next
Level A Ready in 1-3 years								
Level B Ready in 3-5 years								
Level C Ready in 5+ years								



# 2020

Succession Position	Current Incumbent	Eligibility Year	Urgency	Bench Strength
SVP HR	Perry Purple	2023	★★★★☆	C: 3 B: 1 A: 2

### Candidate List

	Candidate Name		Progression to Succession Position			Succession Path		
	First	Last	Level C	Level B	Level A	Current Position	Next Position	Readiness for Next
Level A Ready in 1-3 years	Charlene	Chartreuse			Dec 2019	Director		
	Rachel	Rose			Dec 2019	Director		
Level B Ready in 3-5 years	Otis	Orange		Dec 2019		Director		
Level C Ready in 5+ years	Patty	Peach	Dec 2019			Director		
	Randy	Red	Dec 2019			Manager		
	George	Gold	Dec 2019			Director		



# a

## succession profile worksheet

### the goal:

identify gaps between role requirements and candidates, and assess opportunities for growth

### the steps:

- indicate target position information
- report candidate demographics, education, and experience
- provide position criteria gathered in Success Profile
- use validated assessments to evaluate candidate on qualities required for target role, as indicated in Success Profile
- list gaps between current candidate skills and those required for the target position in each category
- use this worksheet to identify priorities for candidate growth and development opportunities



# candidate profile



# 2020

Succession Position	Candidate Name	Current Position
SVP HR	Charlene Chartreuse	Director

Candidate Demographics	
Location	Charlotte
Level	Management
Area	HR

Candidate Training			
Education	Bachelor's degree in HR	Experience	Supervise 5+ direct reports
	Master's degree in HRM		Expertise developing programs
	7 years in HR field		Liaison for employee-organization negotiations

Focal Role Criteria	
<input checked="" type="radio"/>	Bachelor's Degree in HR
<input type="radio"/>	10+ years in HR Field
<input checked="" type="radio"/>	Best practices in HR
<input checked="" type="radio"/>	Mgmt. of personnel
<input checked="" type="radio"/>	Monitoring and evaluating performance
<input type="radio"/>	Recruitment, hiring, and training of personnel
<input checked="" type="radio"/>	Critical problem solving
<input checked="" type="radio"/>	Manage labor and employee relations
<input type="radio"/>	Administer compensation, benefits, and perf. management
<input checked="" type="radio"/>	Develop and direct safety and recreation programs

Leadership Profile Assessment Results					
Strengths: Current	Client/Customer Focus	SMT Gaps: Current	Achievement and Motivation	Core Role Gaps: Current	Emotional Control
	Analytical Orientation		Facilitating Teamwork		Developing/Coaching Others
	Strategic Planning		Interpersonal Relations		Involving Direct Reports
	Organizational Spokesperson				
Strengths: Future	Prioritizing	SMT Gaps: Future		Core Role Gaps: Future	
	Dependability				
	Objectivity		Operating Upwards		Open-Mindedness



# d

## development plan worksheet

### the goal:

create individual development plans for succession candidates and track their progress

### the steps:

- provide information on candidate and their current function
- list all positions individual may be a candidate for
- choose top development areas from Succession Profile
- rank development opportunities on two criteria:
  - largest gaps between role requirements and incumbent abilities
  - most important or frequently used skills
- with the succession candidate, mutually decide which areas to develop in the short- medium- and long-term
- create measureable goals with action plans and deadlines for each area of development
- keep detailed progress notes on successes and setbacks

# development actions form



# 2020

Succession Position	Candidate Name	Current Position

Top Development Areas	
1.	4.
2.	5.
3.	6.

Development Actions			
Development Area	Action	Complete By	Progress / Comments
3-6 Months			
6-12 Months			
12+ Months			

**Notes**

# development actions form



# 2020

Succession Position	Candidate Name	Current Position
SVP HR	Charlene Chartreuse	Director

### Top Development Areas

- |                               |                               |
|-------------------------------|-------------------------------|
| 1. Developing/Coaching Others | 4. Emotional Control          |
| 2. Facilitating Teamwork      | 5. Achievement and Motivation |
| 3. Involving Direct Reports   | 6. Open-Mindedness            |

### Development Actions

Development Area	Action	Complete By	Progress / Comments	
3-6 Months	Developing/Coaching Others	Discuss and start development plans with direct reports	February 2019	Completed early
	Involving Direct Reports	Identify issues in project and solicit feedback and problem-solving solutions from team	February 2019	Issues identified, still need to ask for feedback
6-12 Months	Involving Direct Reports	Consult with team prior to implementing new policy	August 2020	
	Achievement and Motivation	Implement SMART goals for new projects	August 2020	
12+ Months	Emotional Control	Engage in mindfulness practice to improve emotional control	February 2021	

### Notes



# **m** talent progress scorecard

**the goal:** review program outcomes across important indicators

- the steps:**
- choose organization-specific indicators of success for your program
    - look for ways to add objective, impactful numbers (e.g., money saved, time delays prevented, or improvements made to existing HR processes)
  - gather information from other worksheets, such as the Succession Bench, and from HR tracking systems
  - update this scorecard every 6 months (at a minimum)
  - use this scorecard to communicate success to senior leadership, succession candidates, and across the organization

# talent progress scorecard



## Talent Progress Scorecard

Indicator	Date			
	July 2019	February 2019		
Critical Positions Filled Internally (%)				
Management Positions Filled Internally (%)				
Average Time High-Potentials in Same Role (Yrs.)				
High-Potential Turnover (%)				
Positions with 3+ High-Potential Candidates (%)				
Average Years Until Ready				
High-Potential Engagement (%)				
Employees in Training (e.g., Stretch Assignments) (%)				

# talent progress scorecard



## Talent Progress Scorecard

Indicator	Date			
	July 2019	February 2019		
Critical Positions Filled Internally (%)	52%	64%		
Management Positions Filled Internally (%)	26%	37%		
Average Time High-Potentials in Same Role (Yrs.)	4 years	3.5 years		
High-Potential Turnover (%)	37%	21%		
Positions with 3+ High-Potential Candidates (%)	18%	33%		
Average Years Until Ready	5 years	4.5 years		
High-Potential Engagement (%)	43%	68%		
Employees in Training (e.g., Stretch Assignments) (%)	10%	27%		

# setting up for success



to get the most from succession planning, you need...

- complete support from the CEO
- alignment with strategic planning
- a systematic approach to identify and develop future leaders
- transparent communication
- to incorporate objectivity, accountability, and measurement
- a simple process that is customized to your organization's unique needs

# recommendations



- **review org charts for dependencies and areas of concern**
- identify areas of high need:
  - roles where incumbent is eligible or likely to retire
  - positions that experience high rates of turnover
  - roles where there is no available candidate to replace the incumbent
- consider the skills needed for success in these high-need roles
  - do you have anyone that already has these skills?
  - if a skilled person is promoted, who will fill their role?
- **regularly review and discuss succession bench**
- use discussions to validate assumptions, identify development opportunities, and collectively drive the process forward
- as employees undergo training and development, measure their progress and re-assess their readiness to move into a new role

# succession planning launch series

Delivering knowledge, structure, and resources enabling organizations to independently implement a robust succession planning process



## THE NEED FOR SUCCESSION PLANNING

Due to a variety of demographic factors, there is a heightened sense of urgency for organizations to focus on succession planning to lessen risk and stay competitive.

Despite this urgency, organizations continue to delay making succession planning a priority. As a result, they struggle to simply keep up with every day organizational demands.

SIGMA can help with our [Succession Planning Launch Series](#). This series efficiently delivers everything you need without sacrificing your ability to focus on more immediate priorities.

## SUCCESSION IMPLEMENTATION PLAN TABLE OF CONTENTS

the need	context for succession planning
future of organization	organizational vision
staff statistics	staffing counts, hiring numbers, retirement eligibility
the plan	detailed implementation plan organized by stages
simple succession process	overview of stages
identify critical roles	overview and plan
succession advisory team	list of succession advisory team members
organizational charts	color-coded for incumbent retirement / candidate readiness
build success profile	overview and plan
impact on business	key impact areas for each critical role
draft success profiles	key knowledge, skills, and credentials for each critical role
nominate successors	overview and plan
draft succession benches	candidates sorted by readiness and progress along bench
assess development needs	overview and plan
assessment plans	candidate assessment activities for each critical role
draft succession profiles	summary of candidate attributes as per key criteria for role
develop talent	overview and plan
development plan form	candidate top development areas, activities, and timeline
development tracking form	record of development activities completed / to complete
measure progress	overview and plan
talent progress scorecard	measure of progress indicators over time

## WHAT IS SIGMA'S SUCCESSION PLANNING LAUNCH SERIES?

Through two interactive workshops, we work with your leadership team to build an actionable *Succession Implementation Plan*.

### WORKSHOP 1

In the first (half-day) workshop, we focus on learning about your specific organizational needs and gathering information to help you build your detailed *Succession Implementation Plan*, including:

- **NOMINATING** your Succession Advisory Team
- **DOCUMENTING** your current Succession Planning process
- **IDENTIFYING** Critical Roles to help determine focus moving forward
- **DEVELOPING** draft Success Profiles for each leader
- **DEVELOPING** draft Succession Benches for each leader's team
- **DETERMINING** what Objective Metrics you currently have in place

We then work with what we've learned to prepare a customized *Succession Implementation Plan* for each member of your management team, including a detailed project plan for each stage of the process.

### WORKSHOP 2

In the second workshop, we collectively review, critique, and analyze the implementation plan while:

- **REINFORCING** the urgency of Succession Planning using staff metrics, hiring activities, and retirement eligibility data
- **VALIDATING** draft Success Profiles and Succession Benches by leveraging perspectives from multiple leaders
- **DEVELOPING** Assessment and Development Plans for successors
- **BUILDING** Accountability into the process by assigning deliverables and milestones
- **DELIVERING** the knowledge, structure, and resources you need to successfully implement and manage a robust Succession Process.

The *Succession Implementation Plan* becomes a living document and will form the foundation for managing your process, providing accountability, and measuring progress.

At \$9,500, our [Succession Planning Launch Series](#) is the simplest way for you to build a robust Succession Planning process to ensure your organization's leadership is positioned for success and prepared for the unknown.

Contact Glen at [gharrison@sigmaleader.com](mailto:gharrison@sigmaleader.com) or 800-265-1285 ext. 233 to schedule your workshop now.



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