



The Advisory Alliance 60-Second Email™

Succession Planning: Some Basic Steps

April 30, 2010

In this month's 60-Second Email™, we outline some basic steps to follow for effective succession planning.

In last month's 60-Second Email (TM), I discussed a recent survey that noted 2 out of every 3 large and medium companies either don't have or don't know if they have enough people to succeed incumbents. I underscored how critical it is to have leaders with the mindset that people do make a strategic difference in the organization's success. It's one thing to say this (everyone does), but it's another to actually live and demonstrate this on a regular basis (far fewer do this).

As promised, in this issue we continue with some basic "how-to's" that will help you do some fundamental succession planning, be it for your team, department, division, or corporation.

Step 1 - Confirm the Extent of Succession Planning Needed

- What types of changes do you anticipate in the needs of your markets or customers (internal or external, depending on your situation) in the next 1-3 years? If you can see 5 or more years out, use that instead for your planning.
- How will these changes affect your operations?
- How will the changes in operations affect your staffing?

Here you're getting a sense of what will drive your succession planning. Yes, people have a habit of retiring or leaving the company all on their own. But there are also market- and customer-driven issues that will influence your succession planning. You need to know what these are and how they'll affect the roles and people you focus on.

Step 2 - Identify Critical Roles

- What are the critical roles in your team, department, division, or organization (pick the one that's most relevant for your position)?
 - + Critical because of their direct link to the success of your team/department/etc., and



The Advisory Alliance 60-Second Email™

- + Critical because of the scarcity of people to fill them.
- How do you see these roles changing in the next 1 - 3 years? (Again, if you can see further out, use that timeframe as our reference.)
- Are there any roles that may be added, merged, or dropped?

Notice here that you're not focused on the superstars in your organization. Yes, it would be bad if you lost some of them. But there's also the issue of key roles in the organization. As market forces evolve, so does the level of importance of specific roles in the organization. You need to know what those roles are, and to the best extent possible, what those will be in the future.

With the above done, you're almost halfway there. Next month, will continue the process and take a look at key talent and building momentum.

~~~~~

What else needs to be considered when you're doing succession planning? Share your thoughts with readers on our [blog](#).

You can access all of our 60-Second Emails™, including last month's issue, *Lost Jobs Aren't the Problem. They're the Symptom*, via this [link](#).

Until next month,

**David**

David Harper, Managing Principal  
[dharp@advisoryalliance.com](mailto:dharp@advisoryalliance.com)

**The Advisory Alliance** advises and works with Fortune 500 & Mid-Market companies for improved leadership selection, development, and succession.

You may reproduce this newsletter by including the copyright below and including a link to: [www.AdvisoryAlliance.com](http://www.AdvisoryAlliance.com).

---

**Talent. Leadership. Performance.<sup>SM</sup>**  
**[www.AdvisoryAlliance.com](http://www.AdvisoryAlliance.com)**

© 2010 The Advisory Alliance, LLC. All Rights Reserved.