The **Advisory Alliance**
60-Second Email™

Succession Planning, Part 2: Remaining Basic Steps

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

In last month's 60-Second Email™, I discussed two fundamental steps to initiate effective succession planning:

- *Step 1 – Confirm the Extent of Succession Planning Needed*
  Identify the future issues/changes inside and outside your team, department, division, or organization (the unit that's most relevant for your leadership position) that you expect will have a significant impact on it.

- *Step 2 – Identify the Critical Roles*
  Identify the critical roles in your unit (critical because of their direct link to your unit's success, and/or critical because of the scarcity of people to fill them).

In this issue, we conclude with Steps 3 and 4.

Step 3 – Identify Critical Roles
- Who are the people in your team, department, division, or organization (the unit that's most relevant for your leadership position) you would hate to see leave because their absence would have such a negative impact?
  + What would it take to lure them away? A little? A lot?
  + Who would be ready to step in if these people were to leave?

Most people can answer the first question easily; they could tell you who they'd hate to see leave. However, many people have a hard time with the second question; they just don't know how close or how far key people are to leaving. As a leader, you need to know as best you can how people feel about their job/position and their options. As for knowing who could step in if a key person left,

in some cases, people will know and in other cases, they won't. Often, the answer is, "We don't have anyone." And even in cases where there *is* someone to take over the vacated position, there often is no plan for who will take over for that person.

Step 4 – Find and/or Develop the Needed Talent
- How long would it take to "ramp up" someone (from inside or from outside) to properly fill key positions?
- What then is your plan to fill key positions should they become vacant?
- What are your specific plans (by individual employee) to develop internal talent to fill some or all of your key positions?

The last point is one of the hardest parts of succession planning, because it moves away from the planning and analysis to the developing of people, and that's sustained, long-term development (not an afternoon seminar). Organizations that do succession planning well do it well, in part, because the leaders and managers of the organization view talent development as a fundamental aspect of who they are. It's *not* something that's part of their job. It's who they are as managers and leaders. You don't need to convince or motivate them to do it. They do it because it's what's at the heart of being a great leader: developing great talent who will significantly further the mission of the organization long after the leader has left it.

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What makes succession planning work in your organization? Share your thoughts with readers on our blog. You can access all of our 60-Second Emails™, including last month's issue, *Succession Planning: Some Basic Steps*, via this link.

Until next month,

David

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

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