



## Succession Planning Readiness Tool

*part of our series of Tools*





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## Introduction

Ensuring that you have the right people in the right place at the right time is a cornerstone of talent management. How organisations identify, manage and promote key talent within their organisation and taking a joined-up, coherent and strategic approach to managing the flow of talent are likely to be continuing themes in a period of continued uncertainty.

Succession Planning is essentially the process by which you identify people to fill key positions, although a broader definition might also include the processes by which you develop and promote these people. Some see succession planning as being focused on leadership and senior positions, whereas others take a more inclusive view and extend the process to a wider range of key roles such as product developers, creative leads, client managers and technical experts. Whichever position your organisation has taken with regards to succession planning, it can be difficult to know where to start.

Head Light has developed this tool to help you assess your organisation's current readiness for succession planning and to prioritise your next steps. It is divided into the following sections to help you gather the evidence you need:

1. Key Role definitions
2. The Competency Framework
3. Your Assessment Strategy
4. Development Planning
5. Action Planning

## Completing the tool

Each section contains a number of statements. These can be thought of as descriptions of what organisations which are highly effective at talent management do – or have in place.

1. Read each statement and rate your organisation on the traffic lights using the second column:
  - **Green** – you agree with this statement. The organisation has this in place or does this well.
  - **Amber** – you neither agree nor disagree with this statement. The organisation has made some progress in this area, but there is more work to do.


















- **Red** – you disagree with this statement. The organisation does not have this in place, or it is not done well.
2. In the third column you are asked to consider the evidence that you have to support this. What measures or metrics do you have to demonstrate that this is something the organisation is effective at?
  3. Finally, you should review your analysis with key stakeholders to determine overall level of readiness – how many red lights have you identified?
  4. Think about
    - Are there any quick wins; are there areas of strength on which you can build?
    - What would you need to do to switch some of the amber lights to green?
    - Are there connected themes or related areas which could be addressed by one project or activity?
    - What are the blocks and obstacles? How might you overcome these?
    - Are there any 'red' areas which will derail progress in some of the amber or green areas? If so, might these be priorities for urgent action?

## Using this tool
















When using this tool:

- Challenge yourself / your team to answer the questions in each section as fully and honestly as possible.
- Capture the key points and make an assessment as to whether the answers are sufficient or require additional work.
- Don't try to do too much at once when you are planning your next steps.
- Keep your organisation's strategic objectives and talent vision firmly at front of mind, and test each action for its contribution towards these goals.



























1. Key Role Definitions		Our position	Evidenced by:
1.1	Key roles (i.e. those at risk, those which require specialist knowledge, or those which are pivotal for organisational growth and success) have been identified by evaluating current and future skills needs against the strategy, and the list is regularly reviewed and updated.	  	
1.2	Valid progression paths leading to key roles have been defined, incorporating sideways and cross-functional moves.	  	
1.3	Information about key roles and progression paths are publicised across the organisation, including across organisational divisions.	  	
1.4	Line managers are empowered to identify and develop high potential individuals within their teams, and are motivated to share talent across the organisation.	  	
1.5	Ownership of and responsibility for the co-ordination and execution of succession planning activities is made clear within the organisation (e.g. does it sit within the divisions, or is it coordinated and managed centrally, perhaps by HR or OD?).	  	
























2. The Competency Framework		Our position	Evidenced by:
2.1	The business is actively engaged in the definition of the competencies for key roles.	  	
2.2	The role profiles focus on a few key competencies.	  	
2.3	Competencies are user-friendly, free of jargon and expressed in terms used within the business.	  	
2.4	The competencies are reviewed and updated in line with changes to the business strategy.	  	
2.5	The competency framework includes sufficient detail to differentiate between levels of performance and enables managers and individuals to see the progression in performance/behaviour required in subsequent/future roles.	  	



3. Your Assessment Strategy		Our position	Evidenced by:
3.1	An objective, business-driven assessment strategy is used to identify people with potential to develop towards key roles.	  	
3.2	The target roles have been analysed to determine requisite knowledge, experience and mandatory and desirable competencies.	  	
3.3	The early markers of potential for key roles have been researched and the assessment strategy enables individuals to be assessed against these.	  	
3.4	Assessments are based on the same competencies as defined in the role profiles. Able to identify potential and readiness for specific roles.	  	
3.5	The assessment strategy balances hard performance measures, with customer experience measures and confidence-building measures.	  	
3.6	The assessment strategy includes suitable controls to ensure the results are objective and defensible.	  	
3.7	The assessment process is regarded by those who go through it as objective and fair.	  	
3.8	There are clear links and flows of information between the assessment processes and other succession processes.	  	



4. Development Planning		Our position	Evidenced by:
4.1	Candidates who go through the assessment process receive guidance and support from qualified people to prepare personal development plans to develop relevant competencies in line with their realistic career aspirations.	  	
4.2	Development options are aligned with the competencies associated with key roles.	  	
4.3	A variety of development options are available depending on the nature of the competence, including secondments / attachments, work assignments, action learning sets, and coaching as well as formalised learning courses.	  	
4.4	Development options are publicised across the organisation alongside information about key roles and progression options.	  	
4.5	Action is taken to review progress and follow-up on personal development plans.	  	
4.6	The organisation is able to monitor / track the size of the Talent Pool against key roles.	  	
4.7	The development offering and options available to those not successful in the assessment processes has been clearly defined and communicated.	  	





5. Action Planning		Our position	Evidenced by:
5.1	All key stakeholders have fully bought in to the Succession Planning strategy and process. Those responsible for elements of the process are fully engaged and clear on roles and accountabilities.		
5.2	The process incorporates the ability to collect evaluation data so that the effectiveness of succession planning can be monitored and measured and return on investment evidenced.		
5.3	The processes by which those not in line for key roles are developed and grown are clear and have been communicated.		
5.4	The risks of not being able to meet the expectations of those in talent pools have been explored and plans are in plan to mitigate against those risks.		
5.5	Line managers are empowered to identify and develop high potential individuals within their teams, and are motivated to share talent.		
5.6	An agreed communication plan for those identifies as 'successors'.		
5.7	The processes by which successors will be tracked and managed (e.g. Talent Review Boards) have been defined, designed and agreed.		
5.8	The process by which individuals will be promoted to key roles has been designed and agreed.		



## Next Steps

If you would like to take a know more about Succession Planning and take a look at Head Light's Talent Successor online tool, please get in touch.

## About Head Light

Head Light is an award-winning talent management software and consulting firm that works with clients to define and implement impactful talent management strategies.

Talent Cloud® is our cloud-based portfolio of integrated talent management software tools designed for those who expect the maximum return from talent management processes. Our training and consulting services uniquely complement our breakthrough software that engages employees, managers and senior leaders in the selection, development and progression of people in their businesses.

Companies in the FTSE 350, public sector, large and small, from retailers to high tech innovators have all benefitted from our tools, techniques and expertise. Founded in 2004, we are headquartered in the UK.

Head Light has attained the ISO27001 standard for Information Security. Certificate No 217613.





***How do I...***

*transition to Continuous Performance Management*

***How do I...***

*spot High Potentials and Future Leaders*

***How do I...***

*embed new values and improve culture*

***How do I...***

*introduce robust Succession Planning*

***How do I...***

*drive Engagement through Career Conversations and Development*

***How do I...***

*conduct Skills Assessments and a Gap Analysis*