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Succession Planning That Works: A Whole New Game

“Keep in mind the essence of succession planning: identifying those who can learn from experience—better and faster than others—and matching them to assignments that provide the opportunity to learn the skills your leaders need in the future to grow the business.”

Let’s face it. Many talent management processes (AKA Succession Planning) are built. Very few are operated by line management as an essential business process. Fewer still deliver the goods—fantastic leaders who are better developed than your competition, as a direct result of your planning. Why so few successes? One reason is that many people are stuck in outmoded ways of thinking about and operating their system. They are on the field but playing the wrong “game.” This article uses a game analogy to help people stand back and get a fresh point of view about succession planning that works.

Succession Planning: Don’t Play Dominoes

Playing Dominoes: In the early days, circa 1970, succession planning was like playing with dominoes. The objective was to deal with the question, “If the one ahead ‘falls,’ who is next in line?”

The tool of choice was the replacement planning chart showing who was next to fill the box on the chart.

Pluses: The good thing about playing the replacement planning game was that it got people to ask some useful “what next” questions and to start to take stock of the supply of leaders. In its heyday, planning to replace jobs made more sense because organizations were more stable and jobs and skills more predictable.

Limitations: The jury is in. Replacement planning is not up to the challenge of producing a steady stream of competent leaders for the future. In

this game, management focuses on moving players one direction, up, instead of zigzagging—which produces superior learning.

More problematic, management is often content to just do an inventory of potential replacements but misses altogether the more important objective of rigorously investing in the inventory.

Another common problem of this game is people end up on the chart who are not really ready to take over the role. Either management’s judgments are flawed about who can get ready or they simply let nature take its course. Nature is a slow, erratic way to develop leadership readiness.

Very often the net effect of playing succession according to the rules of this game is failure to make placements from the chart or making placements of people who fail. Either way this leads to lack of confidence in the process.

Avoid playing this dominoes game. It’s woefully short on strategy and will not deliver the results you need.



Succession Planning: Don't Just Play Checkers

Playing Checkers: As people wised up to the limitations of replacement planning they moved to a talent management pool approach. Much better than playing dominoes, this approach looks at qualifying those with potential and putting them in pools.

The tools of choice are decision matrices that compare people on performance and potential and talent pools. Talent pools are like farm teams positioning players for moves to get them ready for the big leagues.

Pluses: Playing this game moves past the rigid model of replacement planning. Better than dominoes, in this game people move in two directions—not just up but across the board. Matching people with assignments shifts the objective from just creating the inventory to investing in the inventory through job moves that provide the opportunity to learn from experience.

Limitations: As played by lots of companies, though, this game is still underpowered. The objectives are often narrowly interpreted as populating the pool and using it as a source for staffing. In this case, the players get equal attention—all are on the board for a good next move—but management still does not pay enough attention to in-depth individualized attention to strategic development over time.



One problem is the natural tendency “to keep score” by how many people you qualify for the talent pool. Particularly in competitive organizations, this leads to superficial assessments that over-rate people.

If managers are allowed to populate the pool with people who do not have good potential, this pollutes the talent pool, destroying its credibility as a source of genuinely qualified people to fill jobs.

Another problem that often occurs is “over-fishing” the pool. When that happens, people move out of jobs before they have really learned the lessons of experience. Eventually, and sometimes quickly, this catches up with them and their development tanks. In the most serious cases, they sink altogether and are fired. This problem is particularly prevalent when there is a low supply of talented leaders.

This situation is indicative of the most serious limitation of playing “checkers”: a lack of substance in assessing development needs and remedies—and poor anticipation and management of the risks of developmental moves. Like a simplistic game of checkers, the focus is on the next square versus attention to the whole board and carefully considered strategies to match people with assignments.

High power leadership development requires attention to at least three dimensions: 1) closely watched people who can learn to lead from experience faster than others; 2) closely watched jobs and assignments that provide the best opportunities to learn the skills needed in the future, and; 3) continuity of attention over time.

Succession planning played like checkers is a two dimensional game. It's better than dominoes, but still insufficient for good long term leadership development.

Succession Planning: Play a Great Game of Chess

Playing Chess: The “game” you need to master to produce real development of leaders is a high power game of chess. This is not a two dimensional game but a multi-dimensional game in which players can move in many different directions and each is valued differently.

For management to be like grand chess masters requires in-depth quality thinking about individual “closely” watched leaders (the chess pieces) and about the job assignments (the chessboard) with attention to the longer term.

Better Tools Used with Greater Discipline: Tools such as decision matrices that compare people are just a starting point. For people you want to “put on the board” you need to look for evidence of both 1) results over time, not just lately, and what skills they used to get results and, importantly, 2) the ability to learn from experience—often called learning agility and, according to latest research, the best predictor of leadership potential.

Once you put people on the board, you need to ponder, deeply, what people need to develop next and what experience they need to develop it. Instead of just the next job, you need to think several moves ahead to the pattern of experience that will provide the “courses” for leaders to go to school on themselves—in other words, a longer term development strategy.

Then you need to hand off the strategy to the individual so that he/she can do good tactical development. You need to require that they develop a disciplined individual development plan, not the skimpy ones that list a need and identify a training course. We’re talking about people doing serious “due diligence” on themselves to pick development priorities and think through a set of tactics that will change behavior. At least 70% of the plan must be learning from experience.

You also need to provide success targets and feedback tools so people can measure up to what they need to develop, and get the feedback they need to “work their plans.”

More Strategy, Better Results: Want to play a great game of succession planning chess? Avoid the limitations of playing dominoes or checkers. Then cultivate the following practices:



- Improve your ability to spot people with the potential to develop leadership on an accelerated basis. Hire more of them; start playing “chess” with their development.
- Thoughtfully match people with the right experiences to develop critical skills and let them know specifically what you expect them to learn.
- Run scenarios out into the future to ensure people get the cross organization moves to develop breadth versus staying in one function or area.
- Deal head on with managers’ natural tendency to hoard talent: require them to let go of their high potential people and accept other’s people—in the interest of longer term development and for the good of the organization.
- Spend time in review meetings getting to know individuals in depth and brainstorm great assignments versus just looking at data and charts.
- Pay attention to outcomes that count—what and how well people are learning skills from experience and applying them to get results—versus paying attention to activities such as who has attended what course.
- Take risks to place people in developmental assignments—ones where they have less than 75% of what they need to do the job—versus making only safe moves that ensure fast performance but little opportunity for development.
- Stay in touch with people who are in over their heads in developmental assignments. Be smart about managing the risks, balancing support with room to learn from failure.

Above all, keep in mind the essence of chess-like succession planning: identifying those who can learn from experience—better and faster than others—and matching them to assignments that provide the opportunity to learn the skills your leaders need in the future to grow the business.