

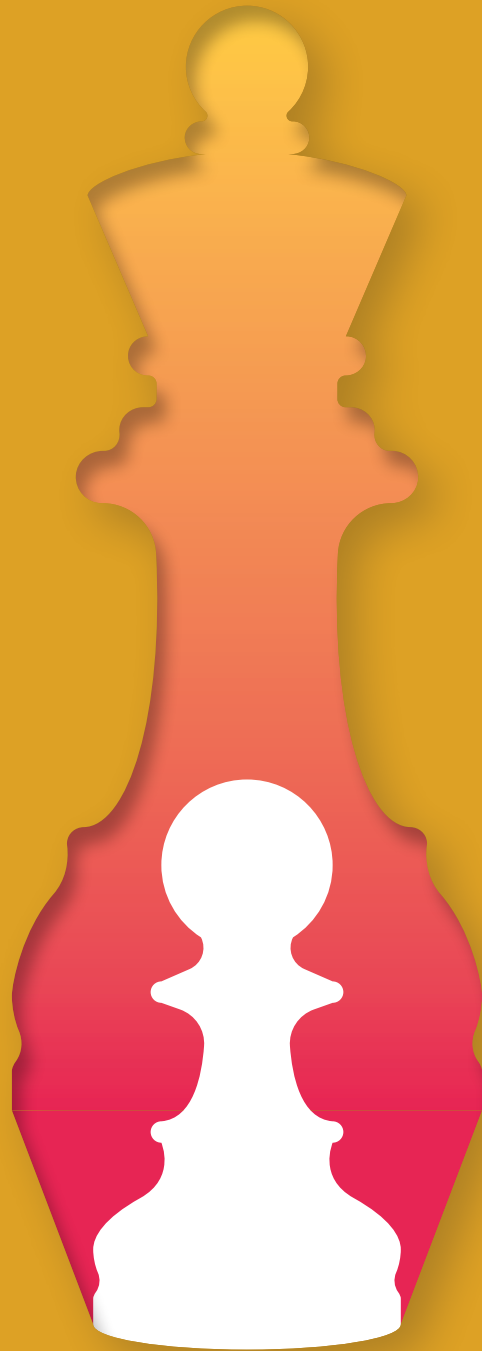
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TIPS, TOOLS & INTELLIGENCE
FOR DEVELOPING TALENT

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Succession Planning for Today's Work World

Annette Cremo and Tom Bux



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TALENT STRATEGY & MANAGEMENT

SUCCESSION PLANNING FOR TODAY'S WORK WORLD

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Nearly every organization wants to become skills-based or skills-centric as they finally recognize the significant value that skills visibility presents across the organization,” notes author Anne Fulton in *HR Executive*.

“Even so, this journey remains nascent because, while employers know what they want, they don't necessarily know how to get it. And nowhere is this more apparent than in succession planning,” Fulton adds.

While succession planning is common in many companies, they often misapply or misunderstand the concept, leading to organizational challenges. Businesses frequently disregard succession planning for many reasons (for example, believing leaders will not leave, thinking it takes too much time, or having apathy to turnover).

“Fundamentally, CEOs—regardless of their success—must remember they are responsible for creating a strong pipeline of managers and not just ones that subscribe to their way of getting things done,” says Anjali Raval in the *Financial Times*, “A CEO is in service to the company, not the other way around.”

A lack of succession planning can destroy the essence of an organization.

In this update of our October 2017 *TD at Work* guide, “Developing a Leadership Pipeline,” we will give talent

development professionals the knowledge and tools to create a succession plan for today's needs. Specifically, we'll explain:

- What a succession plan is, along with its benefits and challenges
- What succession planning looks like in practice
- What competencies, behaviors, and skills companies should grow
- Various ways employers can offer development opportunities

What Is Succession Planning?

As the University of Washington Human Resources web page explains, *succession planning* entails identifying key positions, competencies, and skills that are necessary for the organization's business continuity. The process involves engaging senior leaders and executives and clearly outlining how the organization will develop key talent.

A gap in such skills and competencies could occur for a variety of reasons: retirements, terminations, promotions, and organizational restructuring. Companies overlook succession planning because leaders are so occupied with day-to-day operations that they fail to plan; don't understand the process's importance; don't know which positions are essential to the successful operation of the business; aren't aware of the competencies and skills of key positions; or do not have a process to plan for leadership sustainability.

Sometimes, business leaders forget that other companies can entice personnel to join them. In addition, the succession planning process can cause conflict or resistance among employees who want the opportunity to be involved in a leadership development program or considered as a candidate.

While there are many reasons to put off implementing a program, taking the time to imagine and anticipate the worst outcomes prevents catastrophes. "If you want succession planning to work in your organization, it needs to be the priority," writes business motivational speaker Meridith Elliott Powell in a LinkedIn article. "The CEO and C-Suite must take this on as their responsibility to ensure building an effective succession plan strategy is both focused on and executed."

When Succession Planning Comes Into Play

Succession planning can be a complex process, but it is still essential. By developing a plan, organizations can protect themselves from potential disruptions and ensure they have the leadership to succeed.

Here are three hypotheticals that outline why employers should strive for an active and effective succession planning process—and what could happen if they don't.

Example 1: Jorge is a high performer. He establishes a new customer database that houses all the information on the company's customers, including contact information, sales history, billing status, and leads for new opportunities. Unfortunately, late one Friday, the company lays off Jorge and some members of his department due to restructuring after a recent acquisition.

The following Monday, the department heads ask, "How does the database work?"

Taking the time to imagine and anticipate the worst outcomes prevents catastrophes.

Example 2: During a retreat of executives of a Fortune 1000 company, a sightseeing helicopter crashes. The helicopter carried the CEO, the company president, and two executive vice presidents, including the head of finance. After hearing the news of the crash, in addition to beginning to grieve, the surviving executives and members of the board of directors ask, "Who is in charge now?"

Example 3: Sally has worked at the same firm for 10 years and is giving birth to her first child. She anticipates taking advantage of the company policy allowing six months of maternity leave. Sally heads a highly technical team that creates processes for multiple departments. She has several employees who have worked for her for a long time. Sally asks, "Which one of them will fill in for me while I'm gone?"

According to Chortek Business Advisors, "In the short term, not having a succession plan could mean you lose

Case Study: Succession Planning in Practice

Bill McDermott, former CEO of SAP, a German multinational software company, unexpectedly stepped down from his position in October 2019 after declining to renew his contract. SAP implemented a predetermined succession plan, promoting executive board members Jennifer Morgan and Christian Klein to co-CEOs.

Then, in April 2020, Morgan departed the company, leaving Klein as sole CEO.

In SAP's situation, the focus was on ensuring completion of work and organizational longevity rather than choosing an heir apparent.

McDermott chose Morgan and Klein himself and had been working with them for years. Morgan fully supported Klein's promotion to CEO.

- Waiting until it is too late in certain leaders' careers before developing that potential talent
- Failing to align leadership development efforts with strategic goals, which results in a disconnect between application and strategy
- Neglecting to provide the TD team with support from existing leaders and managers
- Bringing in outside hires instead of developing talent inside the organization

Many traditionalists view succession planning as working ahead of time to prevent position gaps due to retirement or resignation. That thinking, however, overlooks the fact that succession planning is more than a preventative measure; it ensures the continuity of positions, skills, and work.

How Has Succession Planning Changed?

Currently, workers over age 55 make up almost 25 percent of the labor force, per the US Bureau of Labor Statistics. In 2024, the baby boomer generation spans between 60 and 78 years of age. Those who have not already retired will leave the workforce sooner rather than later.

Therefore, organizations must address the need to replace their retiring workers—often the most seasoned, skilled, and knowledgeable—and develop a plan to make the best use of available talent at a time when employers will be increasingly competing for talent. According to Gartner, one of the top five priorities for HR in 2024 is career management and internal mobility across the organization. Many high-potential leaders resign due to a dearth of development opportunities or an inability to advance.

Further, since 2020, many companies have seen a shift in work from traditional office positions to ones that are entirely remote or hybrid. Employees actively move to businesses that align with their individual needs, a factor to consider when many employers are calling workers back to the office.

A common question for corporate trainers and organizational development practitioners is, "What if we train employees and they leave?" The response, of course, is "What if we don't and they stay?"

things fairly quickly. You can lose employees, customers, and rapidly decrease the value of your business. Without a plan, your business can lose its ability to operate and pay employees, vendors, and possibly the bank if there's still a loan involved."

Benefits

Doing the work of succession planning is not easy. There is often a cost, both monetarily and in time.

But consider the many advantages of succession planning beyond business continuity, such as increased resiliency, retention, engagement, employee skill set, and bench strength of promotable employees.

Challenges

To be truly successful with succession planning, TD professionals must address challenges such as:

- Focusing on job-specific competencies and skills instead of general leadership skills
- Developing employees for a specific department instead of a leadership position
- Missing the opportunity to design and implement a robust emerging leader program

Organizations with the most proactive behaviors and a firm set of best practices in place stand the greatest chance of success in this new and changeable economy.

A Road Map for Getting Started

The easiest way to explain developing a succession plan is to imagine you work for a dream state in which all positions have backups and the company will not lose any skills or knowledge with turnover.

Therefore, when conducting succession planning, the focus should be on developing general leadership competencies that enable flexibility when an employee assumes a vacant position in tandem with organizational preparedness. Link the process to the company's vision and values. Incorporate it into the strategic plan, which is the road map to future growth or sustainability of leadership roles.

Rather than identifying specific people or thinking of replacing a person, think about building skill areas in employees so they have the required competencies to transition into a leadership position.

In addition, while job-specific skills are important, future leaders must possess power skills, such as innovation, adaptability, vision, relationship building, a growth mindset, emotional intelligence, and a passion for learning. Include such skills when developing educational programs for future leaders.

Succession Planning Strategies

Succession planning is an ongoing process that companies must continually revisit. Just as employees receive near-constant feedback on their performance, so should businesses work to evaluate their bench depth in key skill areas.

In her book, *Succession Planning Basics*, Christee Atwood suggests reviewing the organization's strategic plan, assessing the current workforce, forecasting future trends, and developing employees in a structured blueprint to replace leaders as they retire or depart the organization.

Develop top managers and have a clear process for picking the next chief executive. "No matter that the

Without a plan, your business can lose its ability to operate.

future seems unusually hard to predict, at a minimum, there is agreement at [the] board level on how to find the next leader and you are equipping your top executives to be better at their jobs," Raval states in her *Financial Times* article.

A good question to ask as you begin your succession planning process is, "Can we replace the skills and capacity of senior executives who intend to retire in the next five years?"

Many companies believe the question is a simple one to answer—but that is because they approach advancement based on the skills of their employees in their current positions. However, just because someone is skilled at a specific task doesn't mean they will become a great leader.

For instance, in a fulfillment center, a high-performing order processor may be promoted to a supervisor position, and high-performing supervisors may be promoted to management. Many businesses believe that a sizable number of high performers in frontline roles correlates to a waitlist of people with the skills required for more senior roles. But that is not necessarily the case.

Before any organization experiences the nightmare of having several empty high-skill positions simultaneously, it should finalize a well-thought-out succession plan with an emphasis on two areas: commitment and process.

Commitment

First make a commitment to viability and sustainability. Then, examine every major leadership position in the organization—not just the C-suite.

Think about what the company would do if one of those roles became vacant. Determine the priorities and take stock of any deficiencies. Such an analysis informs your company's future, whether it is already well equipped or requires significant work.

Consider: What are the company's strengths? What are its weaknesses?

Succession Planning Role Competencies, Skills, and Behaviors

These competencies each list skills and behaviors specific to a prospective succession role. The list is not comprehensive; customize as needed.

- Accountability**
 - Has high-performance expectations for self and others
 - Provides timely and constructive performance feedback
 - Sets challenging goals
 - Establishes metrics to assess the performance of self and others
 - Meets or exceeds deadlines
- Business Focus**
 - Translates company strategy into specific work-unit activities
 - Formulates effective plans to execute strategy
 - Gathers market intelligence from competitors and key influencers within the company's industry
 - Articulates the key areas that differentiate the company from its competitors
- Collaboration**
 - Establishes a climate of trust
 - Addresses and resolves conflict promptly
 - Considers the impact of decisions on constituents
 - Works well with staff at all levels of the company
 - Encourages others to express diverse opinions
- Communication**
 - Expresses difficult messages without personalizing the situation
 - Listens attentively to others
 - Communicates clearly, both in written and oral formats
 - Shares information as needed
- Customer Focus**
 - Champions initiatives that create a hassle-free experience for external customers
 - Responds quickly to internal and external customer inquiries
- Innovation**
 - Seeks better ways of producing results
 - Approaches change with a positive attitude
 - Adapts to unexpected changes
 - Admits to and learns from mistakes
- Integrity**
 - Communicates transparently, with no hidden agendas
 - Gives credit to others for their contributions
 - Remains calm and avoids becoming defensive
 - Assumes the best intentions in others
- Team Leadership**
 - Emphasizes the importance of team successes
 - Gives staff adequate autonomy—does not micromanage direct reports
 - Recognizes the importance of diversity to team success
 - Removes or develops poor performers

Processes

As part of your strategic plan, develop unique goals, strategies, and a timeline. While succession planning is important to a thriving organization, if the business is in the middle of a major product launch with a team of three to five, you may have to extend the succession plan completion timeline until it is feasible to finish. Further, if your team is always busy and strained by extra projects, your goals may be less ambitious, and you may rely on strategies that involve more assistance from outside your department (such as enlisting mentors) than you would if you had a large talent team and your organization was in a static state.

To be successful, incorporate these components of a succession plan:

- Define key positions.
- Identify skills and competencies.
- Pinpoint cracks in the organization.
- Select candidates.

Define Key Positions

What are the most important positions that would cause a loss of productivity, communication, or deliverables if left vacant for a prolonged period? The answers usually require unique skills and experience or additional training. In contrast, exclude entry-level jobs and those that require minimal training.

Assess both job-specific skills and leadership competencies specific to your organization.

Identify Skills and Competencies

In *Effective Succession Planning*, learning and performance expert William J. Rothwell describes three steps that make up the Job Competency Assessment Method.

Research the job components. Determine what duties the person in this job performs; the easiest way to do that is to read the job description. However, even if your company is diligent about keeping job descriptions up to date, remember that job duties often conform to each individual and you will likely need to make changes based on technology, personal strengths, or business insights. Evaluate descriptions as to whether they accurately reflect a position's duties and responsibilities.

Research the attributes of exemplary performers and construct a job competency model. What unique skills do people currently holding these positions have? If they are high performers, what makes them especially successful?

Validate the job competency model. Do the job components, attributes, and deliverables still meet the company's strategic goals? Does a particular position's work further the core competencies that the organization requires?

Pinpoint Cracks in the Organization

As you think strategically about which skills and roles to develop, you'll invariably see cracks in your organization. It's better to see them early so you can address them before a talent gap emerges. Consider:

- Where does the organization already have great depth?
- Are there areas where it lacks depth?
- Are there any roles that, if suddenly left vacant, would create undue stress and hardship for the organization?

After determining key positions, critical skills and competencies, and organizational cracks, decide next steps and choose what is most important and urgent (see "Important-Urgent Matrix" sidebar).

Select Candidates

Choosing potential successors is a challenging decision. For example, a well-liked and trusted employee who is the most technically skilled worker may not have the requisite leadership competencies, behaviors, or skills. Meanwhile, another staff member may be strong in leadership competencies but lack the technological background, skills, and aptitude. Because all people have personal opinions and prejudices, it may be beneficial to convene a succession planning committee to review candidates without bias.

Review the required qualifications such as relevant experience, interest in the position, alignment with organizational values, personality, leadership skills, and learning agility. Next, identify current employees who have or could develop a comparable skill set.

Remember not to limit your decision to staff currently in the specific department. Prioritize someone with the right leadership skill set within your organization as a whole.

Important-Urgent Matrix

Also known as the Eisenhower Matrix, the Important-Urgent Matrix assists with prioritizing competing tasks or goals. Important tasks or activities focus on achieving goals in the strategic plan. Urgent activities demand immediate attention because of the affect they would have if uncompleted.

For example, a company's business strategy changed when the organization altered its product offerings and services. The department leader in charge of an important product offering has unique knowledge for which the company specifically hired them. Members of the product team have knowledge

about the technology and what the product can do, but they lack the communication skills, presence, and relationships to carry the product forward should the product lead leave the organization.

Developing communication skills, presence, and relationships is important because the product is fundamental to business profitability. You may determine that upskilling the team is urgent if its leader anticipates retiring within three years. Alternatively, you could list team training as not urgent if the team lead doesn't anticipate retiring soon and has laid enough groundwork for the product line to continue without them.

	Low Importance	High Importance
Urgent	Matters that are not important to the plan but require your attention	Time-sensitive and critical matters that could have dire consequences if you don't address them
Not Urgent	Low-value items that do not require your attention	Items that have high importance in the succession plan but do not require immediate attention

Finally, match the candidates to the position; add a few candidates to your bench because no one candidate is likely to have all the desired skills, knowledge, and behaviors. Conduct an exercise to determine how best to develop each candidate based on the skill set they need to grow (see Figure 1).

Grow Your Organization's Competencies

Once you have identified the competencies, selected a pool of candidates, and defined gaps, give precedence to how your organization's competencies need to mature. The candidates will have varying developmental needs, and there are many ways to grow their skills and competencies. Three main avenues include mentor-mentee partnerships, leader development programs, and stretch assignments.

Mentor-Mentee Partnerships

Use mentoring to develop talent on a continual basis. As Rothwell and Chee write in *Becoming an Effective*

Mentoring Leader: Proven Strategies for Building Excellence in Your Organization, "Research suggests that people who are involved in a mentoring relationship with an intra-organizational mentor are less likely to quit their current jobs."

For such a program to work, use a mentor-mentee agreement to outline each role and their respective commitments, including how frequently and in what format they will meet, what they will share, and the mentee's goals.

Identify Mentors

Not everyone is equipped to be a mentor, nor is it always the right time for someone to serve in that capacity. Mentors must give of themselves, their expertise, and their time. Additionally, they must maintain confidentiality and have strong communication skills.

An effective mentor:

- Takes and makes time for the mentee and the meeting process
- Prepares for meetings

Figure 1. Sample Candidate Consideration Grid With Growth Plan

Chief Learning Officer	Ready to Assume Role	Ready in One Year	Ready in Three Years
G. Amas			X
F. Dingler		X	
E. McHugh		X	
R. Zufrivich	X		

Development Plans

Amas

- Year-long emerging leader program
- Job rotation
- Coaching
- Stretch assignments

Dingler

- Leadership training program
- Rotational shadowing
- Coaching
- Stretch assignments
- Mentoring

McHugh

- Leadership training program
- Rotational shadowing
- Coaching
- Stretch assignments
- Mentoring

Zufrivich

- Job shadowing
- Mentoring
- Strategic planning

- Checks in periodically on the mentee's progress
- Has interest in the mentoring process
- Allows for the expression of each other's feelings and thoughts in a nonconfrontational manner
- Follows through on their commitments
- Creates an environment in which the mentee can share and feel comfortable
- Maintains confidentiality
- Coaches when necessary

Mentor Matching

When matching mentors with mentees, the individuals should have comparable goals and objectives. The relationship must also increase participants' knowledge and skills. Soliciting information about knowledge, skills, and goals will enable the TD team to make the best mentor-mentee match. Make sure to create the program with these factors in mind:

- The mentor's skills and competencies align with the mentee's goals.
- The mentor has the ability and willingness to share crucial life lessons.
- The mentor is supportive and encouraging when the mentee encounters challenges.
- The mentor listens and encourages critical thinking and problem solving.

Leadership Development Programs

Given today's uncertainty, it's best to equip high potentials with general leadership competencies such as communication, problem solving, business acumen, and critical thinking skills. Some individuals you have identified in your succession planning activities will be best served by taking part in an emerging leader program.

Your company may already have a leadership development program upon which you can build—make sure to include the leadership competencies that you've identified as a gap for the participants (see "Sample Leadership Development Program" sidebar).

Stretch Roles

A good way to engage existing talent to benefit both the organization and the individual is through stretch roles, which are term-defined jobs in which an employee can work beyond their current job description. For example, a frontline worker taking on a manager role.

While undertaking a stretch role, employees gain exposure to some of the responsibilities of the new position while allowing for an "easy out" in the event the role is not a good fit—either for the employee or the business. The individual can then return to their previous responsibilities without vast consequences.

Sample Leadership Development Program

A leadership development program that is part of an organization's succession plan may include the objectives and topics outlined below.

Program Description

This leadership development program builds participants' aspirations, abilities, and engagement. The initiative gives participants the opportunity to grow leadership skills while learning more about their leadership styles. The program will stretch their critical thinking and problem-solving skills as it helps them uncover and apply their greatest capabilities to their leadership roles.

Program Objectives

- Build your tactical management skills.
- Engage with other academy participants.
- Develop a leadership philosophy that is in keeping with your values, your team's expectations, and your most critical leadership objectives.
- Understand your role in developing an inclusive culture, which enables you to leverage that culture for optimal productivity.
- Use your emotions more strategically for greater influence, stronger relationships, and higher levels of productivity from your team.
- Develop a clear understanding of how organizations achieve their missions and strategic objectives.
- Improve your critical thinking and problem-solving skills; understand how your leadership and communication style influences outcomes.

Suggested Topics

Session 1

- Program Agenda and Expectations
- Overview of the Mentoring Program and the Mentor's Role
- Your Role as a Mentee

Intersession Assignment

- Complete the 360-Degree Assessment
- 360-Degree Review Coaching
- Develop an Individual Development Plan

Session 2

- Leadership: Taking It to Extraordinary

Session 3

- Understanding Your Personal Leadership Style

Session 4

- Moving From Operational or Tactical to Strategic Leader
- Problem Solving and Critical Thinking

Session 5

- Emotional Intelligence

Session 6

- Tools for Problem Solving

Session 7

- Communication Essentials and Motivation

Session 8

- Leading Through Change

Session 9

- Dealing With Conflict and Difficult Situations With Tact and Diplomacy

Session 10

- Building Intradepartmental Relationships

Session 11

- Navigating Through Permanent Whitewater: Understanding VUCA

Session 12

- Presentation Skills

Craft stretch roles carefully with agreed-upon expectations, time frame, compensation, and evaluation criteria. Decide in advance what happens after the agreed-upon time frame. That may mean the employee returns to their previous position, achieves a promotion, or tries a different stretch role.

What a Stretch Role Is

A stretch role initiative should have the following elements.

Limited time. Six months is a good start for a stretch role. It is enough time for the employee to gain exposure to the new role, determine whether the position is a good fit, and receive a supervisor's feedback as well as for all parties to evaluate positive and negative outcomes.

Limited scope. Because a new position would mean a whole new set of responsibilities if the employee were to fully assume it, the individual should take on only fundamental aspects of the position. For example, a stretch role from a manager to a senior position may exclude hiring and firing decision-making authority but could include operational decision-making authority in addition to fiscal or reporting responsibilities.

Performance measures. When creating a stretch assignment, include agreed-upon performance measures that follow the SMART goals methodology.

Checkpoints. A stretch position is a learning experience. Conduct regular follow-ups with the TD project lead, the employee, and the employee's direct supervisor. Include the same people throughout the entire process. Weekly meetings are best but should be no less than biweekly.

In addition to standard performance meetings, the person undertaking the stretch role should take part in a mentoring relationship. Pairing the employee with a mentor who is not directly involved in the evaluation process provides additional support and development opportunities.

What a Stretch Role Is Not

In fairness to the employees, remember that stretch roles do not simply entail moving a person to a new role.

Employers should offer participants a bump in compensation for their additional work. The pay raise does

Don't fill permanent positions with employees serving in stretch roles.

not have to be commensurate with the salary of a full-time role, however.

Don't fill permanent positions with employees serving in stretch roles. The goal of having a stretch role is to upskill current staff who show potential. If the company cannot fill the position internally, it may have to hire externally.

Conclusion

When it comes to succession planning, the time to act is now. As many baby boomers age out of long-held positions, they will take decades of irreplaceable experience and knowledge. Combined with increased competition for outside talent, sometimes the best place to find the next leader is from within. Companies that do not address the labor and skills shortages will find themselves incapable of finishing projects, unable to ensure business continuity, scrambling for talent, and working to plug gaps.

As with many organization development projects, the steps are straightforward and established. The first step is often the hardest, but, per leadership expert and author John Maxwell, "A leader's lasting value is measured by succession."

Along the way, remember that modern succession challenges are not problems related only to your company; all organizations—from small, family-run businesses to multinational corporations—face them together. Now is the best time to work on the future. Building strong programs in succession planning can ensure business success for years to come.

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Mentoring Intake Process Forms

Use these forms to establish and build an effective mentor-mentee partnership. After collecting and analyzing the information, match mentors with mentees. To enable greater openness and growth in the relationship, the mentor and mentee should not be in the same department.

Mentor Matching and Selection Information

Mentor: List the information or topics you are willing to share with your mentee. Include anything you would like to teach the individual to help them grow as a leader such as stories, life lessons, and organizational knowledge. Return the form to the person in charge of the program or bring to a mentor orientation session, where you will match with your mentee.

Name: _____

Department: _____

What is your goal for the mentoring relationship? _____

Professional Development	Personal Development	Life Lessons	Organizational Knowledge

Mentoring Intake Process Forms (Cont.)

Mentee Matching and Selection Information

Mentee: List the information or topics you would like to learn about from your mentor. Include anything that would help you grow as a leader. Once completed, return the form to the person or team in charge of the mentor program. They will use the information to match you with a mentor.

Name: _____

Department: _____

What is your goal for the mentoring relationship? _____

Professional Development	Personal Development	Life Lessons	Organizational Knowledge

Stretch Assignment Tasks and Responsibilities Template

Use this template to document what a stretch assignment will entail.

Employee Name		Stretch Assignment		Stretch Start Date	
Current Position		Reviewer's Name		Stretch End Date	
Stretch Position Deliverables	Activities	Necessary Resources	Successful Measurements	Start	End
Current Supervisor			I agree to the position deliverables listed above. I also acknowledge that assignment to this stretch role does not necessarily ensure a long-term position will be available or that I will be offered such a position.		
Stretch Supervisor					
Employee's Signature					

Mentor-Mentee Agreement

This agreement will help each mentor-mentee pair establish communication guides and expectations, identify goals, and outline skill areas the mentee must enhance or develop.

As a mentee, I agree to:

- Meet regularly with my mentor and maintain frequent communication.
- Schedule upcoming meetings that meet both schedules.
- Uncover experiences to enhance my learning.
- Welcome feedback.
- Maintain confidentiality.

As a mentor, I agree to:

- Serve as a mentor and provide guidance, oversight, and encouragement.
- Provide feedback regarding the mentorship contract, progress, and experience.
- Meet virtually or in person at regularly scheduled meetings.
- Communicate openly with my mentee to review their progress.
- Help them work toward identified goals.
- Maintain confidentiality.

This agreement outlines the goals and expectations of the mentor and mentee. Although the thoughtful completion of this form is a requirement, it is understood that items will change and adjust naturally to fit the needs of both parties as the mentoring relationship grows.

We will revisit this document every _____ (e.g., month or quarter) to adjust goals and dates given current accomplishments.

If at any time during the duration of the mentoring contract, one member of the mentoring pair does not believe the other is able or willing to fulfill the items agreed to above, please contact _____.

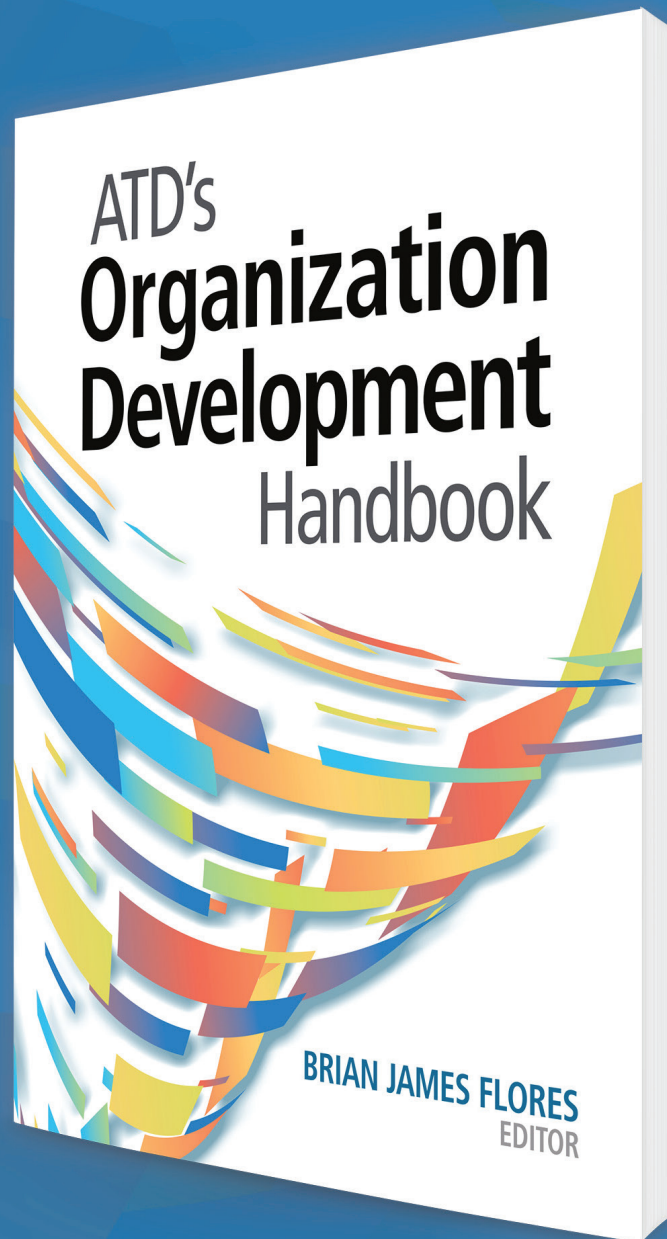
Name of Mentor: _____

Mentor's Signature (may be electronic): _____ Date: _____

Name of Mentee: _____

Mentee's Signature (may be electronic): _____ Date: _____

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