



# Implementing Succession Planning for Critical Roles Below the C-Suite

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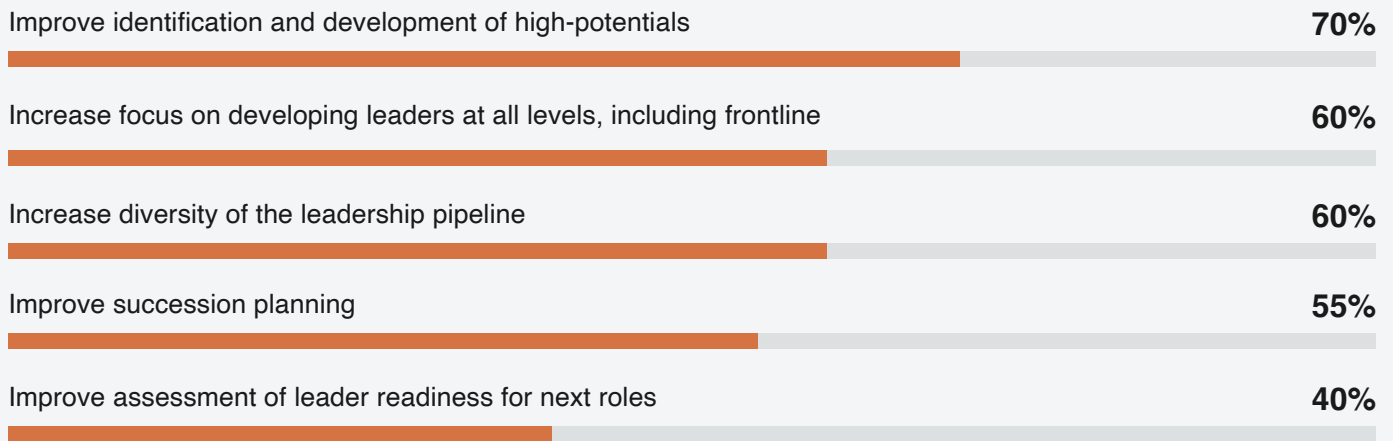


## Current State

While succession planning has traditionally focused on C-suite positions, organizations are increasingly recognizing the importance of extending these practices to critical roles below the executive level. These roles, often overlooked in traditional succession planning, are vital for the day-to-day operations and long-term success of the organization. By implementing robust succession plans for these critical roles, organizations can ensure business continuity, minimize disruptions, and retain valuable institutional knowledge.

However, many organizations still struggle to effectively implement succession planning for non-executive roles. Common challenges include a lack of clarity on what constitutes a critical role, difficulty in identifying and assessing potential successors, and a lack of targeted development programs for these individuals. Organizations need to develop comprehensive succession planning strategies that address these challenges and ensure a consistent pipeline of qualified individuals ready to step into key roles when needed.

### How Organizations Plan to Improve Leadership Pipelines



Source: Brandon Hall Group™ Study, Igniting the Leadership Spark

# Complexities

Implementing succession planning for critical roles below the C-suite presents unique complexities:

- ◆ **Identifying critical roles:** Determining which roles are crucial for the organization's success and require succession planning. This involves going beyond job titles and considering factors such as the role's impact on business operations, the difficulty of filling the role externally, and the potential risks associated with a vacancy.
- ◆ **Assessing potential successors:** Evaluating internal talent and identifying individuals with the potential to fill critical roles. This requires a robust assessment process that considers not only current performance but also future potential, leadership qualities, and alignment with organizational values.
- ◆ **Developing successors:** Providing targeted development opportunities to prepare individuals for critical roles. This involves creating individualized development plans that include a mix of training programs, mentoring, coaching, job rotations, and stretch assignments to build the necessary skills and experience.
- ◆ **Creating a culture of succession:** Fostering a culture that values and supports internal mobility and development. This requires clear communication about succession planning initiatives, providing opportunities for employees to learn about different roles and career paths, and recognizing and rewarding those who actively participate in development programs.
- ◆ **Balancing short-term and long-term needs:** Addressing immediate talent needs while also planning for future succession requirements. This involves finding the right balance between filling current vacancies and developing a pipeline of future leaders, ensuring both current operational efficiency and long-term organizational sustainability.
- ◆ **Overcoming the limitations of traditional succession planning:** Traditional succession planning often focuses on high-potential individuals and top leadership roles, neglecting the importance of developing a broader pool of talent for critical roles throughout the organization. This narrow focus can limit the organization's ability to adapt to change and fill critical roles effectively.

# Implications

Effective succession planning for critical roles below the C-suite has significant implications for organizations:

- ◆ **Reduced Disruption:** Ensures smooth transitions and minimizes disruptions in critical roles, maintaining operational efficiency and productivity even when key employees leave the organization.
- ◆ **Enhanced Organizational Agility:** Creates a pipeline of prepared internal candidates, enabling the organization to adapt quickly to changing business needs, market conditions, and internal restructuring.
- ◆ **Improved Talent Retention:** Demonstrates a commitment to employee development and career growth, increasing engagement and retention of high-potential employees who feel valued and invested in.
- ◆ **Strengthened Leadership Pipeline:** Develops a pool of future leaders at all levels of the organization, ensuring long-term health, sustainability, and ability to innovate and adapt to future challenges.

# Critical Questions

To successfully implement succession planning for critical roles below the C-suite, organizations should consider the following critical questions:



How can organizations effectively identify those critical roles that require succession planning, considering factors beyond just job titles?

What assessment methods and criteria should be used to identify potential successors, taking into account both current performance and future potential?



What development opportunities and experiences are most effective in preparing individuals for critical roles, ensuring they have the necessary skills and experience for future success?

How can organizations create a culture that supports and encourages succession planning at all levels, fostering internal mobility and employee development?



# Brandon Hall Group™ POV

Succession planning is no longer just for the C-suite. Organizations must extend these practices to critical roles at all levels to ensure business continuity, develop talent, and maintain a strong leadership pipeline.

To address the critical questions surrounding succession planning for critical roles below the C-suite, organizations should consider the following:

## 01 Identify Critical Roles

Go beyond simply looking at organizational charts and job titles. Conduct a thorough analysis of organizational needs and identify roles critical for achieving strategic objectives. Consider factors such as the role's impact on business operations, revenue generation, customer satisfaction, and innovation. Evaluate the difficulty of filling the role externally, considering the specialized skills and knowledge required. Assess the potential risks associated with a vacancy in that role, including disruption to operations, loss of productivity, and decreased morale.

## 02 Assess Potential Successors

Implement a robust assessment process that goes beyond traditional performance reviews. Evaluate internal talent and identify individuals with the potential to fill critical roles using a combination of methods. Incorporate 360-degree feedback to gain a holistic perspective on an individual's strengths and weaknesses. Utilize assessments to measure skills, knowledge, and leadership potential. Conduct talent reviews to identify high-potential employees with the necessary skills, experience, and leadership qualities to succeed in critical roles.

### **03 Develop Successors**

Don't just tell employees they have potential; show them by providing targeted development opportunities to prepare them for critical roles. Offer a mix of learning experiences to cater to different learning styles and preferences. Implement formal training programs to build specific skills and knowledge. Provide mentoring and coaching opportunities to foster individual growth and development. Incorporate job rotations and stretch assignments to provide hands-on experience and exposure to different areas of the business. Create individualized development plans to address specific needs and career aspirations, ensuring each employee has a clear path for growth and development.

### **04 Create a Culture of Succession**

Foster a culture that values and supports internal mobility and development. Communicate the importance of succession planning at all levels, emphasizing that it's not just for executives. Provide opportunities for employees to learn about different roles and career paths within the organization through job shadowing, mentoring programs, and internal job postings. Recognize and reward employees who actively participate in succession planning and development initiatives, demonstrating the organization's commitment to investing in its people.

# Authors and Contributors



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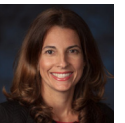
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**Pat Fitzgerald** ([patrick.fitzgerald@brandonhall.com](mailto:patrick.fitzgerald@brandonhall.com)) edited this report. Pat is Content and Community Coordinator. Prior to joining Brandon Hall Group™, he was an award-winning community journalist for 30 years and recognized for his writing, investigative reporting, editing, photography, design and community service.



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