Succession Planning

Succession planning is the process of preparing people to fill important roles when the current holders leave, retire or move on. The Society for Human Resource Management describes it as identifying the knowledge, skills and abilities that critical roles need, and then developing people to be ready for them. It goes beyond simply naming one replacement for each position. Good planning is a steady process, not a last-minute search. Four steps make it practical: identify critical roles, find ready successors, build development plans and review regularly.

1. Identify Critical Roles

The first step is to identify critical roles. A role is critical when its absence would seriously harm the work, such as a position with rare skills, deep customer relationships or key decisions. We list these roles first, because no organisation can plan for every job. For each one, we describe the skills and experience a successor would need.

Example: A bakery owner asks which role the shop cannot run without. The answer is the head baker, the only person who knows every recipe, so this role is marked as critical.

At work: Karim, an HR manager at a logistics company, asks which roles the business cannot run without. He marks the operations director and two senior planners as critical and writes the skills each role needs.

2. Find Ready Successors

The second step is to identify successors. We look at people with the potential and the interest to grow, and we judge honestly how ready each one is. Readiness is commonly grouped as ready now, ready in a year or two, or ready later. Having more than one possible successor for a critical role reduces the risk of relying on a single person.

Example: The bakery owner notices that an assistant shows skill and interest. Asking who could be a successor and how ready each person is, the owner judges that the assistant will be ready in about a year.

At work: Karim asks who could be a successor and how ready each person is. For the operations director role he names one planner as ready in a year and another as ready later. The business now has two options.

This document is a property of Asaseeyat Academy - © Copy Right Protected.

3. Build Development Plans

The third step is to build development plans. A successor becomes ready through experience, not only courses, so plans include stretch assignments, mentoring and exposure to other departments. Each plan names the skills to build, the actions, the support and a time frame. Naming a person as a possible successor is not a promise of promotion, and the plan should say this clearly.

Example: The assistant baker receives a development plan: take charge of the morning shift, learn ordering and spend time with the owner. Following a development plan with a time frame, the assistant grows step by step.

At work: Karim agrees a development plan with the planner who is ready in a year: lead the weekend planning team, shadow the operations director and attend a leadership course. After six months, the planner handles a major customer meeting alone.

4. Review and Communicate

The fourth step is to review and communicate regularly. People leave, roles change and new talent appears, so the plan needs a review at least once a year. Leaders discuss successors openly in talent reviews, checking for bias so that capable people are not overlooked. Successors are told about their development, even if no promise is made.

Example: A year later, the owner sees that the assistant has grown and that another employee shows promise. Reviewing the plan, the owner updates the list of successors.

At work: Karim reviews the plan each year with the leadership team. When one planner leaves, he updates the list, and the other planner moves to a new development step. The company is ready when the operations director retires.

Conclusion

In summary, succession planning prepares people for important roles before the need becomes urgent. It begins with identifying critical roles and finding possible successors. Development plans then turn potential into readiness. Regular reviews keep the plan current and fair. Organisations that plan ahead tend to lose less knowledge when people leave.

Sources

- SHRM: Modernize Succession Planning (toolkit) – https://www.shrm.org/topics-tools/tools/toolkits/modernize-succession-planning
- Rothwell, W. J. (2010). Effective Succession Planning, 4th edition. AMACOM.

This document is a property of Asaseeyat Academy - © Copy Right Protected.