

Succession Planning

What is succession planning?

What would happen if a senior member of your team left? Would you replace them like for like, or could you use the opportunity to promote someone into the vacancy? Have you got a team member who is ready for a larger role but no vacancy to suit them? Could another person from your team take on extra hours or responsibility to fill the vacancy created? Is your headcount exactly in line with plan, or does this give you a chance to adjust it? Have you got the ideal mix of full time and part-time employees in your dept., or could you use the opportunity to adjust this? All this is part of succession planning – not just identifying who could fill a role if someone leaves.

The process of succession planning



Start with a SWOT analysis

Draw a grid as below, and ask yourself a few questions about your team, writing the answer in the appropriate box:

Strengths	Weaknesses
Opportunities	Threats

<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> • What are the strengths of my team? • Am I making the best use of them? • How can I develop these strengths? 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> • Where is my team vulnerable? • What skills are lacking? • What are my weakest areas?
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> • Who has promotion potential? • Who wants to change their hours? • Who wants to change role? 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> • What makes it a threat? • What's the worst could happen? • What can I do to about the threat?

You would do well to involve your team in this process; they may have ideas you've not thought of. When the opportunity arises, consider this as a subject for your next team meeting. Better still, plan now, and keep your plans up to date, so that you won't be taken by surprise when a team member gives notice. As part of the PDR process or as part of a review with a person on a defined training programme, you should discuss career planning with them.

This may reveal some surprises, such as the individual you think has potential but does not wish to progress in the direction you have in mind, or someone who has

ambition but not ability. To avoid these surprises, use the information you already have, which may come from OTOMs, PDRs, informal discussions, or your own strategic thinking. You may also want to involve your line manager and/or HR Business Partner.

Contingency planning

Don't let it stop there! In order to be proactive and stay ahead of changes, carry out a similar succession planning exercise at regular intervals. Always plan for the 'worst case scenario', as then nothing much will find you unprepared. In some areas this is a way of life, as the area has a high labour turnover, for others it may be less frequent. Circumstances may not force you into implementing it every time, but it will highlight where there are development needs unfulfilled, or potential untapped.

Development planning

As well as planning for people moves, plan also how you are going to develop people into the roles they could fill. For example, a team member will not leave work as a sales person one night, and come in the next day functioning as a fully experienced member of management. Consider:

- ‡ What job skills and knowledge training will this person need?
- ‡ What personal skills will they need to develop?
- ‡ What coaching opportunities exist in the department that I could use?

This need not be restricted to job moves; a person who does well at one task could work with the person who's good at another to the benefit of both. Ideally, at any given time each team member would be training someone in their own role, and learning a new role from someone else. The benefits of this, apart from an individual's versatility, will be a skilled and motivated team, plus whatever happens with your team, you have an answer waiting and a contingency plan ready to put into operation.

For related topics see Top Tips:

- **Change Management**
- **Development Methods**
- **Mentoring**
- **Planning**
- **Team Working**