SageTail ADVISORS

Succession Planning Program Scoping

Talent Program Worksheet

This worksheet is designed to help consultants and talent leaders identify the key elements for successful succession planning. Begin by responding to the questions here, and engage sponsors and experts to enrich the responses and gain their support. Collaborate with your team on this document; don't go it alone. Regularly update your responses to incorporate fresh insights and ensure your talent strategy remains effective and relevant to your organization's needs.

Program Intent & Success Measures

Setting up success metrics from the start is crucial for outlining your program's goals and establishing initial benchmarks. Choosing these metrics now clarifies your program's objectives and demonstrates its value. Due to the inherent challenges in measuring the effectiveness of succession planning—like delayed results and limited data—we recommend using a variety of metrics. This helps capture the program's value from multiple angles. Below, you'll find suggested metrics to consider. Choose those that align closely with your program's aims, balancing the effort required to track them with their significance. Opt for a mix of long-term outcome metrics and process metrics for a comprehensive view of progress and impact.

Measures of success	
☐ Cost of labor (long term)	☐ Turnover rate or retention rate
☐ Time to backfill unexpected vacancy	☐ Internal to external hire ratio
☐ Time to become effective in new role	☐ # or % of open positions
☐ Successor performance (rating, success rate, etc.)	☐ Internal promotion rate (in program v out)
☐ Net Promoter Score of program participants	☐ Employee Engagement
☐ % of critical roles with “ready now” successors	☐ % or # Employees in Development
☐ _____	☐ # or % of program participants
☐ _____	☐ _____
☐ _____	☐ _____
☐ _____	☐ _____

Succession Planning Depth- Identify positions

Talent management is beneficial but comes with a cost. The more people involved and the greater the detail of talent plans, the higher the time investment. Organizations need to balance the advantages with the costs to build an effective program. Therefore, it's important for organizations to decide which roles will receive certain levels of talent management and development.

Identify "critical" roles in the table below.

Consider roles where:

- The individual leads a larger team.
- The decisions made significantly affect the business, such as financial outcomes, product quality, strategic direction, and company reputation.
- The work requires independent judgment rather than relying on a team's input.
- It is challenging to find replacements due to the specific skills, talents, or experiences needed for the role.
- There's a higher risk of making a wrong hiring decision due to the difficulty in evaluating these unique qualities.

Position	Notes (Optional)
Example – Chief Technology Officer	*Example: Future leaders will need AI experience. We don't have a deep bench here.*
Example – Finance Managers	*Example: We need Managers to feed the Director positions to feed the regional exec. Directors.*

Designing Your Succession Plan: Tailored Strategies

This section guides you through key design decisions for your succession planning program, tailored to your organization's specific goals and environment. Making these decisions early, in the scoping phase, ensures a smoother implementation and avoids complications later on. Explore and select design elements that align with your program's intent and your organizational context for a more effective and streamlined succession plan.

Preordained or Competitive Selection

Choose how your succession program will work:

- ☐ **Direct Succession:** Choose successors in advance and rank them. These individuals will automatically fill the role without an interview when the position becomes available.
- ☐ **Successor Pool:** Create a pool of potential successors. When a position opens, consider candidates from this pool through an appropriate, competitive hiring process. The term "successors / succession may not be used. Succession is not guaranteed.
- ☐ **Open Development**: Instead of designating specific successors, maintain a broader focus on understanding employees' career interests and potential for various future roles. "Successors" will not be designated.

Successor Search Scope

Who should the leader consider for potential successors?

- ☐ **Leader's Direct Reports Only:** Limit to those directly under the leader
- ☐ **Within Leader's Management Chain:** Consider anyone in leader's line of management.
- ☐ **Organization-Wide:** Look for candidates throughout the entire organization.
- ☐ **Include External Candidates:** Also search outside the organization for potential successors.

Confidentiality and Information Security Protocols

Maintaining strict confidentiality and controlled access to sensitive information is crucial for the program's integrity. Inadequate information management can deter participation, harm engagement, and potentially lead to legal problems. A clear confidentiality policy must be established, communicated, and reinforced consistently. Data systems should be secure to prevent unauthorized access and avoid misinformation. The program's success depends on the leader's diligent oversight of these privacy protocols.

Mark which information should be shared with the individual (successor)?

- ☐ Existence of the talent review, or succession program (Recommended)
- ☐ Their personalized development plan (Recommended)
- ☐ That they have been identified as a successor or potential future leader (Optional)
- ☐ Leader's evaluation of their performance and potential (Not recommended)
- ☐ Sanitized summary of perceived strengths and gaps by team or assessment (Optional)
- ☐ Names of other potential successors (Not recommended)

Mark information that should be shared with manager:

- ☐ List of successors / talent in their organizations (development plans + career interests)

- ☐ List of relevant departmental successors (peer leaders successors' development plans + interests)
- ☐ Assessments for their own employees (optional)
- ☐ Assessments of peer leaders' employees (sensitive / not recommended)

Note: It is common to extend this confidential information to not just the immediate manager, but to all higher managers in the direct chain of command. Verify this and designate if applicable.

This section is meant to capture any additional information permissions outside of those already designated for managers and successors.

Besides specifying what information managers and successors can share, please list any other access rights or exceptions needed.

Person or Group	Description of Access to Confidential Information
Talent Executive (Chief HR / Talent Officer)	All information in the program (all successors, assessments, plans, etc.)
Technical System/ Data Administrator(s)	
Talent Acquisition	
HR Partners	

Sponsorship

The level of sponsorship and organizational commitment shapes the scale of your talent program's launch, whether as a small pilot or a full-scale rollout. It guides who to include in the sponsorship circle and balances the focus between measuring success and implementing the program. This insight helps craft a practical approach for the program's initial structure, prioritizes objectives, and sets a trajectory for growth. When unsure, it's advisable to begin modestly, act promptly, and refine progressively.

Fill in the circle on the '**Organizational Support Continuum** for Talent Management' that best represents your organization's current level of engagement and readiness for implementing a Talent Management Program.

Resist — **Support**

Resistance Expected

Anticipate opposition due to a challenging environment, lack of sponsorship, and previous organizational setbacks. Buy-in is currently low, hindering even pilot program initiation.

Initial Consideration

The concept is unexplored by leadership and its benefits are unrecognized. There's little active management of professional development. A pilot program is considered to demonstrate value and secure a sponsor for expansion.

Conditional Support

While most leadership is on board, they must convince the rest of the organization of the program's value. Professional development is uneven, with participation being voluntary or not consistently managed.

Full Commitment

Decision-makers fully endorse the program, aligning with the company's supportive culture for professional development. Leaders are ready to invest time in talent identification and development, even mandatory participation across the organization would be viewed as mostly worthwhile.

Place a mark on the **'Talent Mobility Culture Index'** where it best reflects your organization's willingness to support employee progression and share talent.

Restrictive — **Promotive**

Restrictive

Our organization tends to keep talent under wraps. Leaders are frequently resistant to team members advancing or moving to new roles, even when it's beneficial for both the employee and the organization.

Variable

While there are areas in the organization where leaders may resist sharing talent, the majority recognize the value in supporting team members' growth and career progression.

Promotive

Our leaders are champions of job mobility, actively encouraging employees to develop and advance within the organization, understanding that this growth is advantageous for both the individuals and the company as a whole.

Leadership Investment & Commitment

These inquiries are designed to determine whether the necessary time and leadership support are available to effectively operate a talent management program. By identifying the realistic limits of time commitment from leaders, the questions enable the crafting of a feasible and professionally tailored program that fits your organization's capabilities.

Program Management Support

Assigning a specific individual to manage the program is essential for its development and longevity, preventing it from being sidelined by other tasks.

Has your organization assigned a dedicated individual responsible for managing the talent management program?

- ☐ Yes, individual identified and committed time is allocated.
- ☐ Not Yet

Leaders' Time Commitment for Talent Discussions

The program's effectiveness depends on leaders actively engaging in talent assessment and collaborative discussions to align on talent development.

What is the total number of hours per year that leadership is willing to dedicate to the assessment and discussion of talent?

Note: In our experience, it takes about 10-15 minutes to administer the assessment and discussion for each individual. The means a leader commitment of one hour would limit the discussion to approximately 4-6 high-potential successors. This factor should be considered when estimating the time a leader will commit, vs the desired scope and depth of the program.

Leadership Capacity for Talent Development

Leaders play a critical role in the active development of their team members through coaching, advising, and providing enriching experiences. However, time constraints mean that not all employees can be developed to the same extent. Leaders may focus on nurturing a select few while others pursue self-directed growth or maintain their current level of performance without seeking advancement.

Considering time and resource limitations, what is the maximum number of individuals you expect a leader to actively develop?

Integrating Succession Planning

Ensuring your talent review program aligns with and enhances existing organizational initiatives is essential. This section will help you identify other programs that might support or overlap with your succession planning efforts, guiding you to find integration opportunities for a more cohesive and effective approach within your organization.

List your existing development programs: Fill in the table with the name of the development program, its learning goal, eligibility criteria, any associated costs, and the contact person for more information.

Consider: Mentorship or Coaching, Rotation Programs, outside the company development, apprenticeships, committee memberships, professional societies, access to self-guided learning platforms, temporary assignments or rotations, etc.

Development Offering	Learning Goal / Content	Eligibility	Cost	Contact
***Example** – Midlevel managers leadership Series*	*Readies managers for executive roles. Project Management, Financial statements through 6-month cohort of 12 classes and case study.*	*Directors and above by nomination only. Limit of 50 per year.*	*No cost or chargeback currently (HR cost center)*	*Gina Smith (HR)*

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Employee Assessments / Evaluations

List any evaluations or assessments used to assess or gather feedback on employees?

Assessment	Goal	Eligibility	Cost	Contact
Example *– 360 review*	*Identify individual strengths and gaps from managers, peer, and subordinate perspective. Gives insight to better improve interpersonal dynamics.*	*Any full time Employee*	*$800 paid by cost center of employee*	*Ali Gustav (Law Development office)*

Identify Stakeholders

Identifying and involving the right stakeholders is crucial to the success of your succession planning efforts.

List all individuals or groups potentially impacting or benefiting from the succession planning process. For each, indicate how they should be involved: as part of the design team, requiring their buy-in or sponsorship, needing consultation, or not involved at this stage.

**Consider executive sponsors, representatives of professional domains (e.g. doctors/ lawyers), other talent support areas, talent acquisition, other training groups, communications, legal, HR, etc.*

Individual or Group	Place on "core team" to design	Gain Buy-in or Sponsorship	Consult or inform as needed	Don't involve yet
Example – Janice from Legal Credentialing and continuing education		X	X	

Congratulations! Completing this worksheet is a strategic step towards enhancing your talent management outcomes. If you're looking for personalized guidance on your results or contemplating your next move, I encourage you to connect with us. Email us at Info@SageTail for a complimentary consultation, where we can clarify your questions, review your planning document, and help refine your strategy to elevate your talent journey. There's no obligation—just an opportunity to further your success.