

Effective succession planning maximizes the use of resources across the entire organization. When succession planning is allowed to play out at the micro rather than macro level, that objective is difficult to achieve. One test of effectiveness is to pull back and look at how many of the individuals who have been placed in management positions when openings occur are on the organization's high-potential list. If you don't have a high hit rate, you're not making optimum use of your talent.

Following are some of the best practices I recommend and ways to overcome resistance to them.

Involve the same cross-organizational group in broad talent management and succession planning. One candidate can't fill multiple jobs, yet it's common to find the same candidate on multiple succession lists across a single tier of the organization. Working at the macro level is a reality check. It provides the opportunity to focus and optimize the development of such high-potential individuals for the good of the organization as a whole, and make sure all the succession bases are covered with candidates who are best suited to the positions.

Resistance to group succession planning, especially if it's a new process, often comes from executives who are nervous about looking good to the group. I help them prepare their succession lists and/or development plans and presentations. I may hold a preview meeting where one group member makes a sample presentation. Letting everyone see what is expected reduces tension, discomfort, and resistance so the process moves along better.

Aggregate jobs into pools. In a world where job descriptions change so fast, a narrow position-by-position review can be a waste of valuable time. Job pooling keeps talent management and succession planning fresher, more flexible, and more applicable.

I recommend creating a small number of pools tight enough to have credibility, without aggregating too much—for example, all top-level financial positions rather than all CFOs. If the pools are too large, people will sidestep them and an informal subsystem will emerge to undermine the process.

Setting up a separate succession plan for jobs that have a unique set of requirements and don't obviously fit into a pool could set an unfavorable precedent. A better approach is to include the "unique" job in a pool and foot-

note viable candidates. You'd be surprised at how many of those "narrow" candidates will prove able to fill a variety of the jobs in the pool.

Members of the succession planning group often resist pooling because they regard their jobs as unique or feel they'll lose control over selecting their own replacements. I have them provide succession lists for their jobs, with the understanding that these will become part of the total input. I may encourage them to identify candidates for jobs other than their own, which they may not regard as being quite so unique. The idea is to use their input to build the new approach rather than forcing them to participate in something they don't buy into.

You can't develop people in secret. It's counterproductive to put someone forward for a job who will turn it down when the time comes. False starts don't move the organization forward.

I recommend holding pre- and post-meeting conversations. The first is a normal development conversation: "Where do you think you have the talent to go? What are your goals and aspirations? What do you think you need to develop to achieve them?"

The follow-up conversation is more sensitive. It shouldn't be, "You're the second candidate for the CFO job in Oshkosh." What the candidate should hear instead is, "You're being considered for a senior financial management position in a major division. It might require development of XYZ to prepare, and involve relocation. Are you interested and willing?"

Do "what if" scenario planning. Once the succession plans are done, scenario planning is particularly helpful for improving the diversity of the top ranks. For instance: "What if we had to replace the entire top team with the first candidate on each list? Would the diversity statistics improve or decline?" This exercise might suggest the need for external recruiting to build a more diverse talent pool for top jobs. It's better to identify that early so the talent can be in place when openings actually occur. ■

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