Talent and Succession Management: Where next?

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Wendy Hirsh, Principal Associate, IES
Karen Coleman, Head of Learning & Development, Plan International
Agenda

- Towards an integrated approach
- Where are you now?
- Plan International: case study
- Talent management: Where next?
- Your priorities for action
- Learning from the day
Talent Management:

Towards an Integrated Approach
Towards an integrated, ‘best fit’ approach

- **Purposes:** what do we want from T&SM?
- **Populations:** which jobs, people and needs?
- **Principles:** values, culture & wider PM approach
- **Processes:** to identify & develop, integrating with other PM processes
- **Players:** responsibility and capability of senior management, line managers, employees & HR?
Integrating ‘succession’ and ‘talent’

- Identify Our Key People:
- Develop Our Key People:
- Identify and Mitigate Current Risks:
- Identify and Mitigate Future Risks:
- Identify and Protect Critical Roles and Hard-to-Replace People:

Focus on key people

Focus on key posts

Our plan of action

Key actions to develop key people and build capability within and across the business

Insights from our plans

Do we need to plan for additional skills/capabilities critical to future success?
‘Talent’ not just about top leaders

- More specific skills and faster response required
- Over 60% say they have TM principles and processes for whole workforce
- Succession planning still covers most senior, ‘strategic’ roles - increasingly global approach
- Over half plan for ‘critical’ roles - key to (operational) performance and hard to fill
- Key professional groups and top experts more essential to strategy - over 40% plan for these
- Both succession planning (job led) and talent (more person led) approaches being adopted together
‘Potential’: clearer than ‘talent’ but still not easy

**POTENTIAL (for future growth)**
- Measures specific behavioural attributes
- Evidence-based judgement on future progression
- Aptitude for rapid learning
- Nearly all those identified as having potential are current high performers

**PERFORMANCE (against current role)**
- About measurable achievements
- Assessment against current role
- Against current capability
- But not all current high performers have potential

**INDIVIDUAL**
For succession planning purposes remember that an individual with potential may be suited to a number of roles in the future
## Clear framework for behaviours

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<tr>
<th>Head</th>
<th>Heart</th>
<th>Guts</th>
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<tr>
<td>Flexible Thinking</td>
<td>Self-Awareness</td>
<td>Drive</td>
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<tr>
<td>Combines rigour and pragmatism,</td>
<td>Deep appreciation of own strengths and weaknesses, uses this insight to manage their behaviour effectively</td>
<td>Desire to make a difference and have a broad impact on OURCO</td>
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<td>flexing appropriately between</td>
<td>Organisational Insight</td>
<td>Initiative</td>
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<td>decisiveness and reflection</td>
<td>Solid insight into OURCO UK and International, and how to achieve success within it</td>
<td>Tendency to set and pursue a path without the guidance of others</td>
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<td>Forward Thinking</td>
<td>Range of Influence</td>
<td>Self Belief</td>
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<tr>
<td>Proactively spots issues and</td>
<td>Interpersonally adaptive and</td>
<td>Deep seated belief in ability to achieve goals and overcome obstacles to success</td>
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<td>anticipates opportunities and</td>
<td>influential on those around them</td>
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<td>problems early on</td>
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<td>Framing Ideas</td>
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<td>Generates innovative, new</td>
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<td>perspectives and understanding of</td>
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<td>situations, enabling fresh</td>
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<td>approaches to be taken. Simplifies the complex effectively according to audience</td>
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Succession & ‘pipelines’ can be more tangible & less emotive than ‘talent’

**Strength**
Key roles with **Ready Now** successors.

**Depth**
Key roles with **Ready Soon** and **Ready Later** successors. **Emerging Talent** as successors to key roles.

**Quality**
Confidence that the pipeline is a **true reflection** of individuals who are capable and appropriate for the role.

Succession pipeline **rich in diversity** (e.g., differences of experience, background, flexibility, gender, ethnicity).
Integrating across processes

- Strategic WORKFORCE PLANNING and RESOURCING STRATEGY
- IDENTIFYING AND AGREEING SUCCESSORS/talent pools and their DEVELOPMENT NEEDS
  - Succession and development plans + supporting information
  - TALENT/SUCCESSION FORUMS
- ASSESSMENTS of performance and potential + criteria
- Individual CAREER ASPIRATIONS and interests
- Personal career and development planning (PDP)
- JOB FILLING
- RECRUITMENT
- DEVELOPMENT including developmental work experiences
- TRACKING AND EVALUATION
Different structures for talent development

- Tailored individual development, including career experience for high potential successors
- ‘Pools’, sometimes with some shared development
- Programmes (e.g., leadership skills and knowledge) directed at high potential groups/successors

In any of these, individuals may play a key role in managing their own development.
Development offers and approach

70% ON-THE-JOB DEVELOPMENT

- Challenging self in current job
- Expanded job responsibilities
- Projects / ADP
- Job rotations / Secondments / Temporary assignments
- Role in outside organisations

20% DEVELOPMENTAL RELATIONSHIPS

- Coaching / Feedback, including 360°
- Mentoring
- Associations / Networks / Advisory positions

10% FORMAL DEVELOPMENT

- Self-directed learning
- Courses and programmes
  - First-Line Leader
  - Leading Delivery
  - Leading Business
  - Enterprise Leadership
Development by career stage

Top 200

Director Level High Potential Streamers
- High Potential Development Scheme and ongoing support for Directors who continue to display high potential and have the aspiration to reach the Top 200
- Transition support for newly promoted D
- Secure promotion

Deputy Director Level High Potential Streamers
- Phase 1: Senior Leaders Scheme
- Phase 2: Implementation of development plan
- Phase 3: On cusp of promotion
- Transition support for newly promoted DD
- Secure promotion

G6/G7 Level High Potential Streamers
- Phase 1: Future Leaders Scheme
  - Complete formal learning
  - Development manager support
- Phase 2: Implementation of development plan
  - Lighter touch development manager support
  - Brokerage support for move to OGD or secondment
- Phase 3: Individual on cusp of promotion
  - Diminishing support from development manager
  - Expectation development plan will have been actioned
- Secure promotion

Feeder Streams: Departmental/Professional Talent Programmes, Fast Stream, Fast Track Apprenticeship Scheme, Positive Action Schemes.
Talent reviews: collective & devolved

- Corporate line owners
- Devolved line owners
  Divisions/Functions/Geographies
- Line & functional management
- HR/ L&D
- Individual
Part of discussion cycles for individuals

Career discussion -> Performance review

Talent or succession reviews/forums -> Regular 1-1 discussions throughout the year

Skill & Career Development action -> Development plan

Feedback to individual
Where have (some) employers got to?

- **Populations** chosen with care - not just ‘the top’ - work where there are real issues & progress achievable
- Simpler, clearer guidance on (leadership) ‘potential’
- Integrate **processes** within T&SM and with performance, workforce development, job filling *for all employees*
- **Players**: Managers working together (eg in talent reviews) - how conversations with individuals fit into cycles
- **HR** role often well established at corporate centre
- Recognising that effective approaches evolve over time
Where are we now?

- What are the strengths of your current approaches? What’s working?
- Where do your challenges lie in making succession and talent management effective?
Talent Management:

Where Next?
Where next? Some challenges
Process ‘kit’ is not enough
Potential & development ‘for what’? Paths, pools and sometimes posts
Action-oriented ‘segmentation’

Potential for moving:
- Level
- Function
- Unit

Time frame

Destination

Role/career type

Faster?

Broader?
Talent deployment not often realised

The following model should be used to facilitate a vacancy discussion and help determine the most appropriate succession candidate, taking into account 3 main questions:

1. What is the role type?
2. What is the acceptable business risk if the candidate is unsuccessful or a bad fit?
3. What is the urgency - how quick is the need to fill the vacancy?
Different kinds of conversation

PERFORMANCE
- What do you need to prioritise?
- How well are you doing? (what and how)
- What learning will help you do your current job better?
- How will you access this?

POTENTIAL & CAREER
- What kinds of work do you want to be doing in future?
- Does this fit with how others see you?
- Work-life issues and choices
- Possible kinds of paths/moves & timing
- Pros and cons of options
- What skills/experience do you need to be credible candidate?
- How will you develop this?
More effective career conversations

- Clear about what conversations, when and in what settings
- Formal and informal
- Role is to start or encourage but not always to resolve - signposting to others and door opening
- Agenda setting
- Manager has facilitative/coaching role
- Offer honest, constructive feedback and reality check
- Shared language of ‘career options’ helps
- Help employee towards clarifying actions
- Being clear about what is to be shared and what is in confidence

Why call them ‘difficult’?
What support does HR need to give?

- Help managers identify real business issues
- Process design - preferably co-design with the line
- Practical explanation and guidance
- Choreography of formal discussions
- Information handling, including actions agreed
- Working across the business
- Helpmate and coach to managers
- Confidential advice to employees
- Partner in development delivery
- Evaluation and tracking

How do you support this locally?
Where might TM go next?

- Clearer, lighter ‘kit’ - simpler guidance for managers & staff
- Getting the degree of detail right - HRM-potential-succession
- Potential for what? Reflecting real business needs/career paths
- Innovative links with job filling and deployment - open job market alone is not fast or efficient enough
- Long, slow move back to active career development
- Part - but not all - of this is better ‘career conversations’
- Sustained & effective HR support - not just for the top
Your priorities for action

Looking back at the challenges you identified and/or others we have discussed today...

- What 2 or 3 *priorities* would you identify in your own organisation to make succession and talent management more effective?
- *What* does HR need to do & *how* will it be working to support managers & employees?
Thank you

www.employment-studies.co.uk

wendy.hirsh@employment-studies.co.uk
Some further reading


IED (2014), *Report on Senior Executive Succession Planning and Talent Development*, Stanford University


