



HRBP Guide to Succession Planning

Introduction

Succession planning is crucial for ensuring the continuity of critical roles within an organization. This process involves selecting and developing key talent, identifying top performers, and mentoring potential leaders for advancement into top-level positions.

By outlining the role of HR in succession planning and providing step-by-step guidance and practical tips and tools, this guide is designed to support HR professionals in mastering succession planning.

Table of contents

- // **The role of an HRBP in succession planning**
Understand your role as a facilitator to get succession planning right.
- // **Stakeholders to involve**
Foster a collaborative approach to succession planning by involving the right stakeholders.
- // **The succession planning process**
Follow this step-by-step process to optimize succession planning. It includes roles, stakeholders, activities, and tips and tools per step.
- // **Final tips**
Implement these tips to ensure a smooth process.

The Role of an HRBP in Succession Planning

As an HR business partner, you facilitate succession planning to ensure a seamless transition of responsibilities. More specifically, your role includes:

- Supporting organizational leaders in identifying top talent for future positions.
- Assessing the current workforce, identifying key roles, and evaluating employees' potential and readiness for advancement.
- Implementing development programs and facilitating career pathing discussions.
- Monitoring progress and providing regular feedback.
- Ensuring diversity and inclusion throughout the process and adapting to evolving internal and external factors.

Your insights and strategies help create a robust pipeline of capable leaders ready to step into critical roles as needed. Balancing short-term organizational demands with long-term talent development objectives can be complex, often presenting challenges such as resistance to change, limited resources, and difficulty accurately predicting future needs.

By shifting from an administrative to a strategic focus, HRBPs continuously engage in succession planning, support line managers in making informed decisions, and ensure the organization's talent pipeline is future-proof. Your instrumental role helps prevent future issues, facilitates smoother transitions, and supports the organization's strategic goals, even without dedicated L&D support.



Stakeholders to Involve

To ensure effective succession planning, HRBPs involve various stakeholders in the succession planning process. By involving these stakeholders, HRBPs ensure a comprehensive and collaborative approach to building a robust talent pipeline, fostering organizational continuity and growth. See below an overview of relevant stakeholders and the role they play:



Senior leadership

Provides strategic direction and identifies key roles critical to organizational success. Their involvement ensures alignment with long-term business goals.



Line managers

Offer insights into team performance and potential. They are crucial for assessing employee capabilities and readiness for advancement.



High-potential employees

Provide feedback on career aspirations and growth opportunities while actively participating in their development plans.



Talent development and L&D teams

Help design and implement effective development programs and career pathing initiatives.



HR analysts and talent management specialists

Provide support with data analysis, performance metrics, and the application of tools like the 9-box grid, ensuring a fair and comprehensive assessment process.



External consultants

Bring expertise and an external perspective to refine succession strategies and development plans when needed.

The Succession Planning Process

Succession planning typically includes the following steps:

Talent segmentation

This involves identifying critical roles in the organization that are essential for its continued success and growth.

1

Preparing for the talent review meeting

This involves gathering data on employees' performance, potential, and development needs, and preparing presentations or reports for discussion.

3

Monitoring & tracking

This involves regularly tracking the progress of identified successors and their development plans, ensuring they are on the right path to readiness for critical roles.

5

2

Talent mapping

This involves identifying critical talents within these roles, assessing their skills, performance, and potential for future leadership positions.

4

Running the talent review meeting

This involves conducting structured meetings with key stakeholders to discuss talent assessments, identify high-potential employees, and make decisions on development plans and succession paths.

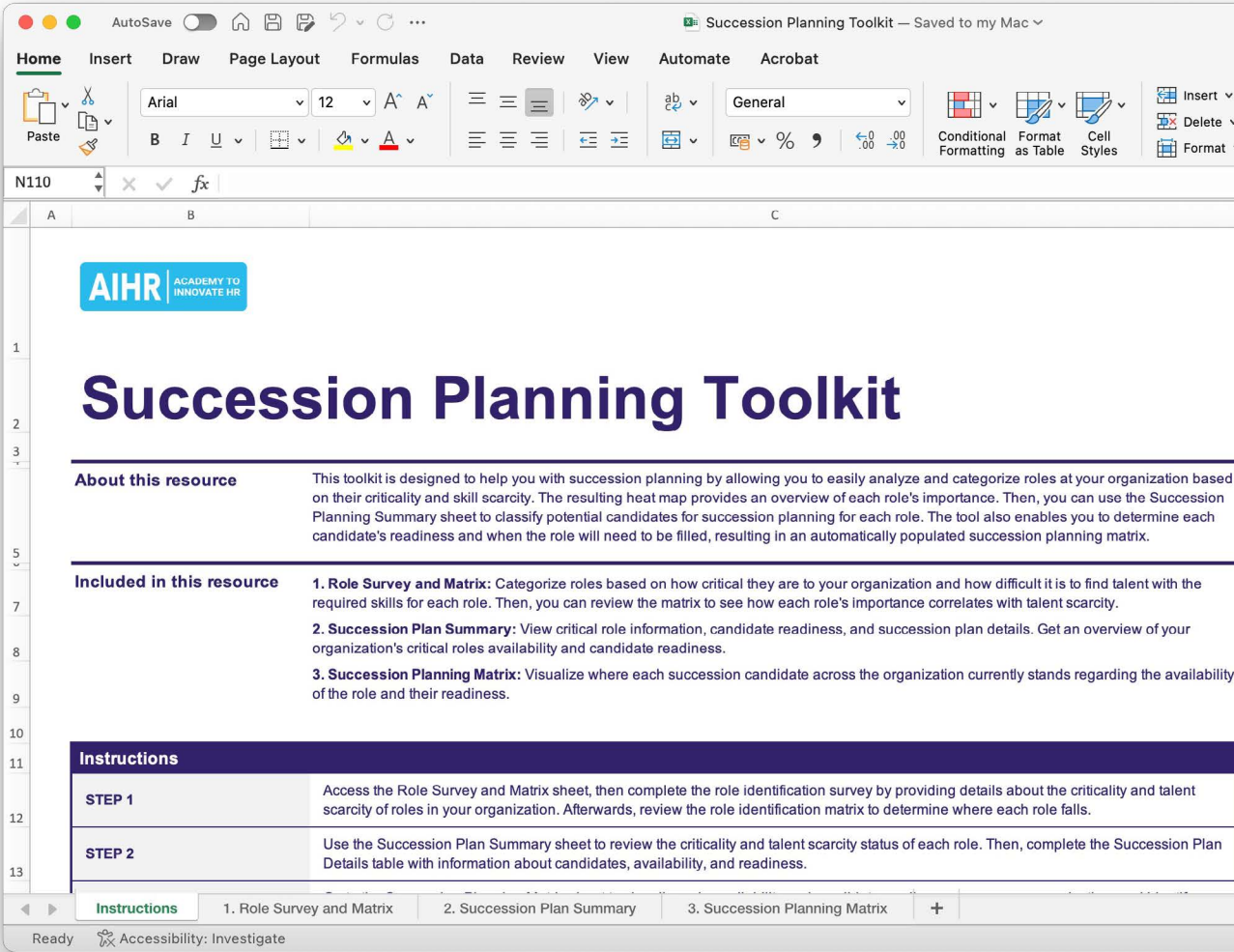
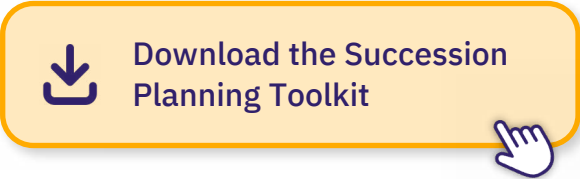
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Reporting on talent health

This involves creating and sharing reports on the overall health of the talent pipeline, highlighting areas of strength and gaps, and providing insights for continuous improvement of the succession planning process.

The following pages guide you through your role in each of the steps, stakeholders involved, activities to follow, and practical tools you can apply.

Download the Succession Planning Toolkit below, which you can use throughout the entire succession planning process.



1. Talent Segmentation

DEFINITION

Talent segmentation involves identifying critical roles in the organization that are essential for its continued success and growth.



TOOLS

Role impact analysis templates

To create an overview of critical roles and their impact, use the “1. Role Survey and Matrix” tab in the [Succession Planning Toolkit](#).

HRBP's role

- Collaborate with senior leadership to define and prioritize key roles.
- Analyze the organization's strategic goals to align critical roles with business needs.
- Ensure a diverse and inclusive approach to role identification.

Stakeholders

- Senior leadership
- Line managers
- HR specialists
- Representatives from talent management, learning & development, and DEIB

Activities

- Conduct workshops and meetings to discuss and identify critical roles.
- Review organizational structure and strategic objectives.
- Gather and analyze data on role impact and dependencies.

2. Talent Mapping

DEFINITION

Talent mapping involves identifying critical talent within these roles and assessing their skills, performance, and potential for future leadership positions.



TOOLS

Talent Mapping Playbook

Download the [Talent Mapping Playbook](#) for a detailed overview of the talent mapping process. Note that you have already completed some of the steps described there.

9 Box Grid

Download this [9 Box Grid](#) template to map employee potential and performance across your organization.

Succession Planning Toolkit

To create an overview of potential succession candidates, use the “2. Succession Plan Summary” tab in the [Succession Planning Toolkit](#).

HRBP’s role

- Facilitate discussions with line managers to identify potential leaders.
- Use performance data and potential assessment tools to map talent.
- Ensure diversity and inclusion in talent identification.

Stakeholders

- Line managers
- HR specialists
- Talent development teams

Activities

- Conduct talent review meetings with line managers.
- Analyze performance metrics and potential assessment results.
- Identify development needs and career aspirations of high-potential employees.

3. Preparing for the Talent Review Meeting

DEFINITION

Preparing for the talent review meeting involves gathering data on employees' performance, potential, and development needs, as well as preparing presentations or reports for discussion.

HRBP's role

In preparation for the talent review meeting, you need to:

- Decide on the level of talent review (criticality and scarcity).
- Identify the stakeholders you need to involve and their roles and responsibilities.
- Meet current role-holders and their managers to better understand the intricacies of the roles you want to create a succession plan for.
- Prepare a prereading pack for the participants of the talent review meeting.

Stakeholders

- Line managers
- HR specialists
- Talent development and L&D teams



To identify who needs to join the talent review meeting, ask yourself the following questions:

- Who has decision-making authority about this role?
- Who can allocate resources and budget to execute your succession plans?
- Who knows the roles and potential successors well?



TOOLS

9 Box Grid

Review the performance and potential data in the [9 Box Grid](#).

Succession Planning Toolkit

Review the [Succession Planning Toolkit](#) to prepare for the talent review meeting.

Activities

- Meet with current incumbents and managers to discuss the following points:
 - What criteria are important to consider for succession in this role?
 - Are we already developing any candidates for succession?
 - If so, why did we select them?
 - If not, why have we not identified anyone for this position?
- Review the performance and potential data you collected in the talent mapping step.
- Prepare a prereading pack for relevant stakeholders, including detailed reports and presentations.
 - Start with a positioning statement to explain the purpose of the talent review.
 - Note the focus of the talent review (whether it is skills or roles).
 - Provide an overview of the approach you follow in your talent practice. Explain how you identify talent, the criteria you use, and when you use differentiated versus inclusive strategies.
 - Summarize insights from the successor pool (including the number of roles and individuals identified, succession readiness, demographics, and experience).
 - Outline the expectations and desired outcomes of the session.
 - Include individual talent profiles as an appendix. Highlight the confidentiality of the information and protect it with passwords and access controls.
 - Allow enough time for panel members to review the extensive prereading materials before the session, so do not wait until the day before to share the information.
- Schedule and organize talent review meetings.

4. Running the Talent Review

DEFINITION

In the talent review meeting, you discuss talent assessments, identify high-potential employees, and make decisions on development plans and succession paths.



TOOLS

9 Box Grid

Use the [9 Box Grid](#) template to illustrate your talent assessment.

HRBP's role

- Facilitate and guide discussions during talent review meetings.
- Ensure fair and objective assessments of employees.
- Help identify development opportunities and succession paths.

Stakeholders

- Senior leadership
- Line managers
- HR specialists

Activities

- Use assessment tools to evaluate employees.
- Develop action plans for high-potential employees.

5. Monitoring and Tracking

DEFINITION

Monitoring and tracking involves regularly tracking the progress of identified successors and their development plans, ensuring they are on the right path to readiness for critical roles.

HRBP's role

- Continuously monitor the progress of high-potential employees.
- Provide regular feedback and support to line managers and employees.
- Adjust development plans as needed to ensure alignment with goals.

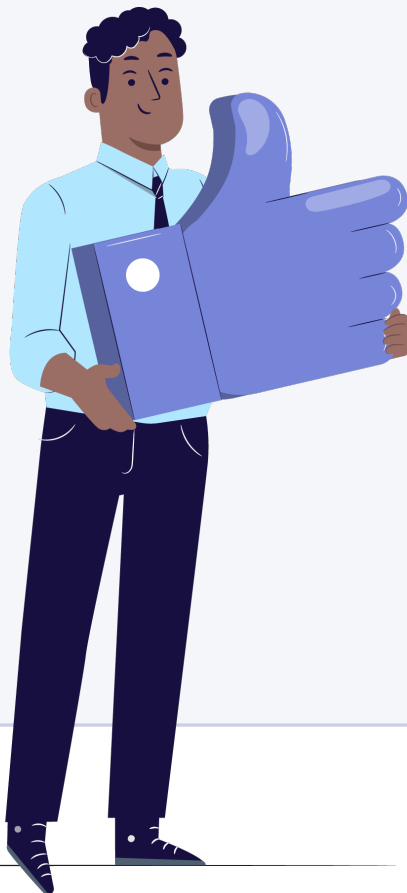
Stakeholders

- Line managers
- Talent development teams
- HR specialists

Activities

- Track progress using development plans and performance data.
- Conduct regular check-ins with line managers and employees.
- Update and refine development plans based on feedback and progress.

Tips



- Use **development plan tracking tools** to help monitor the progress of employees toward their development goals. These tools can include features like goal setting, progress tracking, milestone tracking, feedback integration, and visual reporting.

Examples include software like Betterworks, BambooHR, and Trello.

- Use **performance management systems** to manage employee performance through goal setting, continuous feedback, performance appraisals, and development planning. Performance management systems often include features like goal tracking, performance reviews, feedback mechanisms, and reporting.

Examples include 15Five, Lattice, and ClearCompany.

- Use **feedback forms** to gather input from employees, peers, and managers on various aspects of performance and development. They can be used for performance reviews, 360-degree feedback, and regular check-ins. Effective feedback forms are designed to be easy to complete and provide valuable insights that can drive improvement.

Examples of feedback form tools include Google Forms, Typeform, and SurveyMonkey.

6. Reporting on Talent Health

DEFINITION

Reporting on talent health involves creating and sharing reports on the overall health of the talent pipeline, highlighting areas of strength and gaps, and providing insights for continuous improvement of the succession planning process.

HRBP's role

- Compile and analyze data on the talent pipeline.
- Create comprehensive reports on talent health and succession readiness.
- Share insights and recommendations with senior leadership and stakeholders.

Stakeholders

- Senior leadership
- HR specialists
- Talent development teams

Activities

- Collect and analyze data on talent development and readiness.
- Prepare detailed talent health reports.
- Present findings and recommendations to senior leadership.

Tips



- **Identify key metrics and KPIs.** These should include diversity metrics, bench strength, succession readiness, and development readiness. Use standardized metrics and definitions across all reports to avoid confusion and ensure comparability.
- **Ensure data accuracy and consistency.** Regularly validate and clean data to ensure accuracy and consistency in reporting.
- **Use standardized metrics.** Using standardized metrics and definitions across all reports will help avoid confusion and ensure comparability. Train HR staff and managers on data entry and reporting procedures to maintain high data quality.
- **Leverage technology.** Automate reporting and dashboard generation, reducing manual effort and errors. Streamline data flow between HR systems and reporting platforms with integration tools. Offer self-service reporting for managers to access relevant data on-demand.
- **Be transparent in your reporting.** Maintain transparency in reporting to build trust and ensure all stakeholders are informed. Tailor reports and presentations to the audience, focusing on what is most relevant to them.

Best Practices

Follow these best practices throughout the succession planning process:

1

Engage stakeholders early and often.

Regularly communicate updates and gather feedback to ensure alignment, buy-in, and collaboration throughout the succession planning process.

2

Use data-driven insights.

Leverage performance management systems, talent analytics software, and other data tools to gather and analyze relevant information, and make better succession decisions.

3

Focus on continuous development.

Implement targeted development programs, facilitate regular career pathing discussions, and encourage continuous learning and mentoring opportunities to ensure that high-potential employees are continuously growing and ready to step into critical roles when needed.

4

Create a culture of talent development.

Promote and support talent development initiatives across all levels of the organization. Encourage leaders to actively participate in mentoring and developing their teams, and celebrate successes and progress in talent development.