



Move!  
Organizational Learning

# Succession Planning

NOT JUST FILLING THE GAPS...

CLEMENT LEEMANS

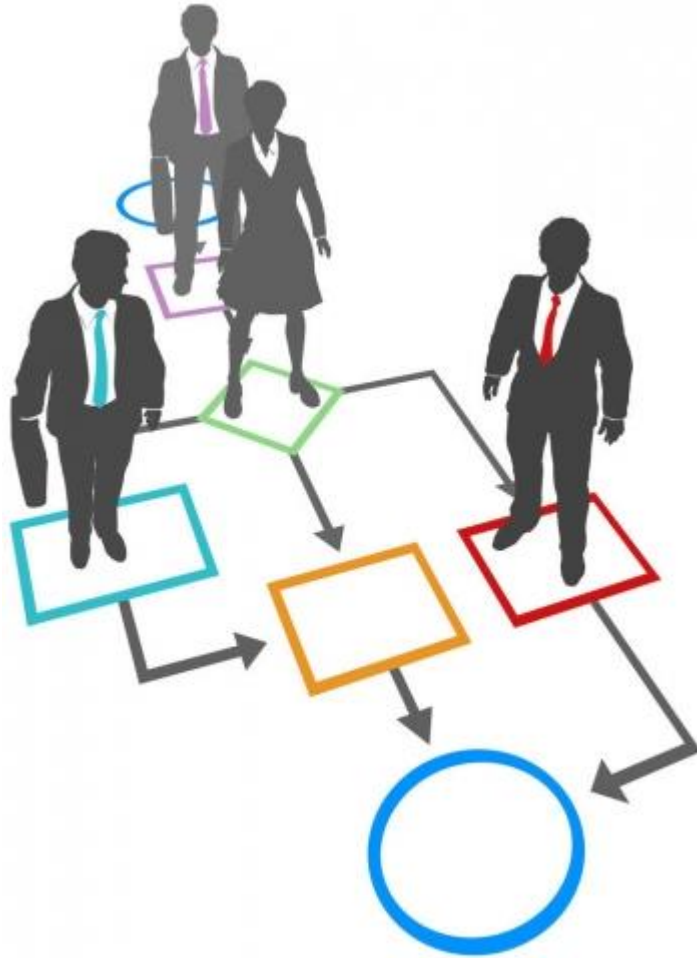
20-05-2020

This is my initial response to a customer demand. The presentation is the one that has been discussed with the customer. Data that are privacy sensitive or that could lead to trace the client-organization involved have been carefully removed. I share this case with the OD community for learning purposes only.

# What I learned about the 'Client-Organization'

- A NON FOR PROFIT, ENVIRONMENTAL ACTIVIST
- PERFORMANCE IS ON THE CROSSROADS OF LEGAL EXPERTISE, TECHNICAL EXPERTISE & COALITION BUILDING
- RELATIVELY SMALL (150) AND GROWING (+/- 10 PERCENT / YEAR)
- VERY DIVERSE AND MULTICULTURAL
- SCATTERED OVER SEVERAL TEAMS, EXPERTISE AREAS, SITES, CONTINENTS
- A RATHER 'ORGANIC' ORGANIZATION
- VALUE / BENEFIT DRIVEN (SOCIAL AND SOCIETAL RESPONSIBILITY IS KEY)
- NO ROBUST HR PRACTICES IN PLACE YET
- ACTIVE IN A FIELD THAT IS STILL VERY VOLATILE, UNPREDICTABLE :
  - Legal expertise
  - Activist methodologies
  - The technological expertise
  - How society looks at ecology, climate change and sustainability issues
  - The political and geopolitical situation

## Their original demand



« CAN YOU LAY OUT A VISION AND PLAN FOR US INTRODUCING TALENT MANAGEMENT AND SUCCESSION PLANNING PRACTICES »

# Succession Planning ? Do we have a choice ?

## TRADITIONAL PROCESS ?

## AN ALTERNATIVE APPROACH ?



- TRIGGER A DYNAMIC LEARNING & DEVELOPMENT CULTURE WHERE PEOPLE ARE PASSIONATE TO DEVELOP THEIR TALENT & EXPERTISE, EXPAND THEIR HORIZON & EXPERIENCES AND CONTRIBUTE TO THEIR 'SHARED AMBITION'
- START WITH A DIALOGUE IN THE ORGANIZATION ABOUT :
  - How do we make room for everybody to contribute with their talent, passion, experience, expertise ?
  - (How) do we learn from our experiences in assignments and projects, (how) do we share experiences between projects, sites, ...
  - How to create (and take on) learning opportunities for all ?
  - How to stimulate cross expertise, roles, sites, ... collaboration ?
  - How to develop the expertise and capabilities (as an organization) to be ready for future challenges (resilience and build sustainable performance) ?
- To :
  - Make them think about their own passion, talent, and how to use it in and for the organization
  - Engage everyone in the reflection on development for 'sustainable performance' as organization
  - Develop ownership for the process and the initiatives that will be taken following the initial dialogue.

# Succession Planning ? Do we have a choice ?

*"Succession planning focuses on identifying and growing talent to fill leadership and business-critical positions in the future".*

## FROM : REPLACEMENT PLANNING

- Mechanistic, assumes predictability, stability in terms of 'positions to fill and job requirements' (which is often not the case)
- Puts a lot of effort in a plan that ultimately often doesn't materialize
- Focus is on positions to fill and that drives 'development and learning' for an individual (narrow path)
- All kinds of unforeseen events or 'out of sync' timing make it relatively unsuccessful (and very inefficient)
- It creates lists of 'possible candidates' to fill a position
- It creates 'competition' between those in and out the 'pipeline (and provoke valuable people to leave)
- It leaves many talented and highly educated people out of the process (disappointment)
- It looks too exclusively at 'upwards mobility' making all other forms of enriching experiences 'less valuable' in the perception
- It's too Top-Down and not always very transparent (ownership lies with a small group controlling the process, which often creates mistrust and suspicion)

## TO : A VERSATILE DEVELOPMENT CULTURE

- Flexible. Doesn't assume that jobs, job content, or needed expertise and competencies are fully predictable
- Focus is on developing passion, talent, new experiences, other (new) fields of expertise,... and that makes people ready for new assignments, job-enrichment, projects, other jobs, other roles, ... (broad path)
- Everybody is involved in the development dynamic
- Everybody can experience 'success' (which can mean very different things for different people)
- It allows for a culture of mutual support (learning with and from each other) i.s.o. competition for a vacant position
- It allows to explore the 'expertise & competences' for future needs (in function of geo-political, ecological, technological, legal, ... evolutions )
- Puts people in charge of their development and career and invites them to explore 'new opportunities'
- Is fully transparent and everybody is involved (no secret lists, meetings, etc...)

# That initial dialogue...

## ● DESIGN THE 'DIALOGIC ACTIVITY':

- Develop the idea further in a 'core group'
- Build an effective way to really trigger the dialogue and to avoid the 'replacement logic'

## ● FORMAT :

- Everybody involved (live + online)
- Maximize the mix : cross roles, levels, sites, countries, projects, expertise, ...
- Designed as a 'genuine dialogue' looking for an organizational discourse on development and not a 'diagnostic exercise' to list problems (Appreciative Inquiry philosophy)
- Facilitated (possibly by people of the core group ?)

## ● DIFFERENT METHODOLOGIES POSSIBLE (COMBINED) :

- Focus groups
- Large Group Intervention (e.g. Future Search, Open Space, Appreciative Inquiry)
- Experiential activities to trigger the dialogue
- Supported online (social media, website forum, ...)

# After that initial dialogue

- **BUILD ON THE DIALOGUE TO DEVELOP ACTIONS TO SUPPORT THE LEARNING & DEVELOPMENT CULTURE.**
- **FIND WAYS TO CONTINUE THE DIALOGUE AS WE EVOLVE INTO THAT LEARNING CULTURE**
- **EXAMPLES OF POSSIBLE INITIATIVES OR APPROACHES (POSSIBLY INTEGRATED OR COMBINED) :**
  - Setting up learning networks (Communities of Practice) for the major expertise areas in the organization
  - Review mobility and the allocation of assignments, tasks, projects, etc.... (create opportunities for people who want to expand their scope)
  - Encourage distribute leadership
  - Use of Development Portfolio's (for individuals, shared online ?, ...)
  - Implement coaching, mentorship to support people when they take on 'stretch assignments' or a new 'role'
  - Job-Crafting to identify their passion and talent and to shape their job in function of their contribution to the organization and the development of their talent
  - After Action Review (to identify and share learnings from experience)
  - Create an App or web platform to support networks, learning, finding new experiences ( 'offer & demand' )
  - Design 'experiential learning tracks' to develop key organizational capabilities for sustainable performance (ex : (leadership, build effective stakeholder relations, project management, ...)
  - Offer 'development center' and 'career coaching' services ....
- **CREATE A TRANSPARENT PROCESS TO FILL INTERNAL VACANCIES OPEN TO ALL (IN FUNCTION OF THEIR EXPERIENCE AND LEARNING HISTORY)**



# A flavour of the 'desired situation' (in the longer term)

A learning dynamic, where the 'shared ambition' of the organization serves as 'driver' for each individual to create opportunities to grow, collaborate transversally and develop new ideas, insights, expertise, behaviours to contribute to the organization now and prepare for future challenges the organization will be facing.

- **Individual ownership & energy for talent development**
- **Sharing their 'development path & experiences' (ex : through portfolio's online)**
- **Working with others in networks**
- **Coach & Be Coached (learning with and from each other in a very flexible way)**
- **Professional Networks (Communities of Practice) as drivers for the development of key expertise areas**
- **CoP's are developing the 'expertise for the future' through networking with other stakeholders, universities, think-thanks, ...**
- **Transparent & very active internal mobility beyond 'promotion' and 'job changes' (job-enrichment, stretch-assignment, co-working, temporary job swap, etc....)**
- **Room for individual initiative and experimentation**

That will create a 'flexible and versatile' pool of capabilities, drives, ...that will offer a solution for 'replacement issues', with a lot of 'development collateral' (not linked to replacement but making the organization more flexible and versatile) and without the downsides like internal competition, unfulfilled promises, suspicion, disappointment, brain drain, lost development investment, etc..



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