



The Knowledge Bank

Navigating the Succession Planning Journey: Practical Steps and Meetings





Introduction

Now that we have laid the groundwork by understanding the importance of general expectation profiles (JEPs) and their role in succession planning, let us delve into the practical steps. Succession planning is not a theoretical exercise—it is a dynamic process that requires active participation, clear communication, and strategic alignment. In this section, we will explore how to translate theory into action.

1. From JEPs to Role-Specific Succession

Role Segmentation

Remember, JEPs provide the initial lens through which we view roles. Now, let us apply this lens to specific positions. Here is how:

- **Strategic Roles:** These are the top-tier positions—the CEO, CFO, CTO. Start by identifying potential successors for these critical roles. Look beyond the obvious choices; sometimes, an n-minus-2 candidate possesses unique qualities that align perfectly with the organisation’s vision.
- **Operational Roles:** Middle management, department heads, project leads—they form the backbone of execution. Evaluate who could step into these roles seamlessly. Consider competencies, performance, and alignment with company values.
- **Policy and Implementation Roles:** These roles drive day-to-day operations. While not glamorous, they are essential. Identify successors who excel in execution, adhere to values, and contribute consistently.

Strategic Roles	Operational Roles	Policy & Implementation Roles
CEO	Middle Management	Coordinators
CFO	Department Heads	Project Managers
CTO	Project Leads	Service Delivery Managers



2. Objective Assessment Meetings

A. Frequency and Participants

- **Frequency:** Conduct regular assessment meetings. Quarterly or semi-annually works well. Remember, agility matters—adjust the frequency based on organisational dynamics.
- **Participants:** Involve HR, senior leaders, and managers. Their perspectives are invaluable. If possible, include the current role holder—they can provide insights and mentorship.

B. Agenda and Preparation

- **Agenda:**
 - Review JEPs for relevant roles.
 - Discuss potential successors.
 - Evaluate performance against objectives.
 - Assess competencies and alignment with values.
 - Identify development needs.
 - Address any roadblocks.
- **Preparation:**
 - Managers should prepare by reviewing individual performance data.
 - HR compiles relevant information—JEPs, performance metrics, and competency assessments.
 - Senior leaders align on strategic priorities.

3. Transparency and Communication

A. Transparency

- Be transparent with potential successors. Let them know they are being considered.
- Share growth prospects and development paths.
- Encourage open dialogue—succession planning is not a secret club.

B. Communication Channels

- Use 1-2-1 meetings for personalised discussions.
- Talent review sessions provide a broader view.
- Leadership forums allow strategic alignment.

4. Celebrating the Journey

Remember, succession planning is not just about the destination—it is about the journey. Celebrate each step, each successor, and each contribution. By integrating JEPs, objective assessments, and transparent communication, organisations build robust leadership pipelines and ensure continuity.

Ready to streamline your succession planning process? The Knowledge Bank's software powered by PMC offers the tools you need to translate theory into action. Conduct regular assessment meetings, evaluate potential successors, and communicate transparently to build a robust leadership pipeline. Book a demo today and see how our solutions can ensure your organisation's continuity and growth. Unlock your organisation's future with the Knowledge Bank.

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