

Succession Management Implementation Guide

Four steps for building high-impact succession plans



Look inside to:

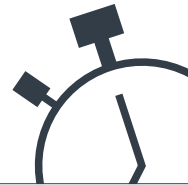
- Identify which roles truly need a succession plan
- Customize high-potential development
- Help newly promoted leaders succeed in their first 180 days

TOPIC

Succession management

READING TIME

60 min.



BEST FOR

HR leaders and senior organizational leaders

RECOMMENDED PREP

- Review existing succession plans for your organization
- Access editable versions of the tools and templates at advisory.com/hrac/successionmanagement

LEARN HOW TO

- Pinpoint future leadership gaps
- Identify top talent
- Customize high-potential development
- Personalize onboarding for internal hires

Succession Management Implementation Guide

Four steps for building high-impact succession plans

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Executive Summary

Succession Management Is More “Doable” Than You May Think

Conventional wisdom is right: succession plans are important. All organizations aspire to have seamless transitions whenever a key leader departs—be it planned or unplanned. For HR leaders, the challenge is translating this broad aspiration into actual practice. And it can be especially daunting for health care HR leaders, who often look at the highly resource-intensive succession management programs in corporate America and see no way to translate them into health care.

Demystify Succession Management with These Four Counterintuitive Insights

The goal of this toolkit is to simplify and demystify succession planning for health care organizations. Succession planning is much more “doable” than is often thought—especially if you apply four counterintuitive insights to your succession planning efforts. These insights are:

- 1. It is OK to start small.** Start with a handful of succession plans and prove ROI with a small number of seamless transitions. Perhaps even more counterintuitively, when you are deciding which (small) number of positions you want to build succession plans for, don't make the decision based on title alone. Prioritize positions that would immediately impact daily operations if they are vacant for a day—for instance, the director of surgical services.
- 2. Performance reviews alone won't identify high-potential staff** who should be considered for a “next-level” position. At most organizations, performance reviews are so inflated that a very high percentage of staff are rated “top talent.”
- 3. Don't rely solely on supervisors to prepare top talent** for their next-level role. All too often, supervisors don't have insight into the specific knowledge and experiences top-talent staff need to succeed in their next role—and even if they do, supervisors often lack the time and resources to create an effective development plan.
- 4. Create onboarding plans for internal promotions to critical roles.** Many organizations overlook the fact that even internal candidates need support and feedback as they acclimate to a new role. A small investment in time and energy to provide internal promotions with clear milestones, support, and feedback will pay outsized returns in terms of ensuring new leaders succeed quickly in their roles.

12 Tools to Build Strong Succession Plans

This guide contains ready-to-use tools that will enable you to build effective succession plans for the most critical roles in your organization.

STEP 1

Pinpoint Future Leadership Gaps

Overview

Get the biggest return on succession planning efforts by creating succession plans for a small number of positions. Prioritize those that have high retirement risk and high strategic importance.

Rationale

Given limited time and resources, health care organizations must prioritize those positions that truly warrant a succession plan. In particular, HR leaders should strategically identify and prioritize a limited number of positions for which a successor will be identified and formally groomed.

Associated Resources

- Succession Intervention Evaluation Tool

To identify a short list of positions warranting investment in succession planning, HR leaders should consider two factors: the likelihood of an incumbent retiring and the position's strategic importance. For the first factor, organizations often use the average age of incumbents. But this approach doesn't necessarily capture *when* retirements are likely to happen. For that, you must also gather qualitative data from incumbents (or their supervisors) to gauge which leaders are likely to retire within the next two years. As shown here, this qualitative information can help you avoid underinvesting—or overinvesting—in positions based on average age alone.

When considering the second factor—position criticality—HR leaders often default to identifying all executive roles as “critical.” Most executive roles probably are critical; however, there may also be roles beyond the C-suite that have a substantial impact on organizational performance. These roles may also warrant succession plans.

Relying on Averages Masks Most Urgent Retirement Risks

(Mis-)Targeting Succession Planning at Prague Health System¹

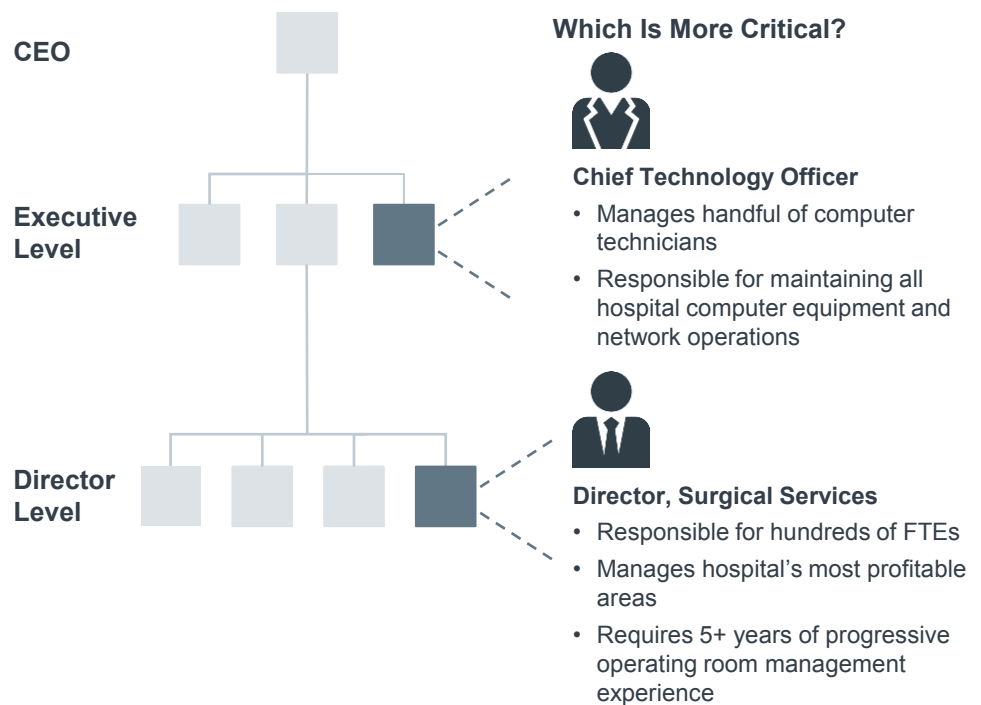
Position	Average Age
Chief Financial Officer	58
Director, Materials Management	57
Manager, Nurse	56
Director, Planning	54
Director, Nursing	53
Assistant Manager, Nurse	46

Although oldest leadership cohort, most CFOs at Prague plan to work until age 65

Despite fifth oldest average age, nurse directors are a greater cause for concern as numerous directors plan to retire within two years

Missing Critical Roles Below Executive Ranks

Sample Leader Position Criticality Comparison



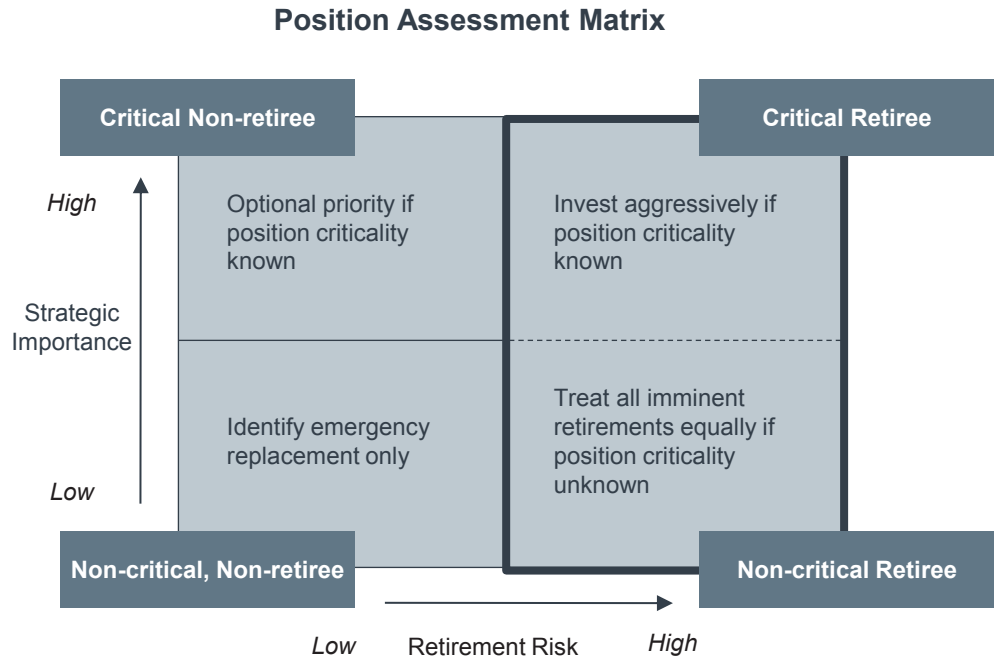
1) Pseudonym.

Source: HR Advancement Center interviews and analysis.

Using position criticality in addition to retirement risk offers a more targeted approach to succession planning than focusing more generally on retiring leaders. However, the process of identifying critical positions can be onerous and sometimes inaccurate. So if your organization has not already identified critical positions, you should prioritize succession planning efforts based on imminent retirements alone.

The tool in this section will help you identify roles most vulnerable to retirements. If you also have information on position criticality, you should prioritize individuals in critical positions at risk for retirement.

Weighing Position Criticality and Retirement Risk



Source: HR Advancement Center interviews and analysis.

Succession Intervention Evaluation Tool



Note on Use

This tool provides HR leaders a step-by-step process for pinpointing jobs most vulnerable to retirements. It includes instructions for analyzing age data as well as considerations for determining which positions truly warrant formal succession planning.

Step-by-Step Instructions

- 1 Calculate average age of employees by job title or management level.
- 2 Sort titles in descending order of age and pinpoint top 10-15 titles with oldest employees.
- 3 For individuals with these titles, directly survey current jobholders or interview supervisors to determine what percentage of these employees plan to retire within the next two years.
- 4 For those planning to retire in the next two years, consider the following factors to determine if formal succession planning is necessary for the position:

Volume of Potential Departures

- Are multiple individuals holding the same title planning to retire within a similar timeframe?

Strength of Existing Pipelines

- Are there already strong internal (junior-level roles, cross-trained staff from other departments) or external pipelines in place for this role?
- If so, will these pipelines, at current course and speed, produce enough candidates to meet the need created by retirements?
- Does HR need to take measures to increase existing pipelines or target new labor pools?

Future Importance of Role

- Will this role be more or less important in the future?
- Are there any plans to phase out or outsource this role?

Interpreting Results

Job title with few near-term retirements, strong pipelines, or decreasing importance may not require formal succession planning.

- 5 For remaining titles, HR should develop customized retention plans for each incumbent while simultaneously grooming successors.

▶ Access this tool: [advisory.com/hrac/successionmanagement](https://www.advisory.com/hrac/successionmanagement)

STEP 2

Identify Top Talent

Overview

Objectively identify staff who are ready for “next-level” positions, and who should be potentially included in succession plans.

Rationale

After selecting a limited number of positions warranting succession plans, organizational leaders need to identify a limited number of individuals with the potential to fill these roles. However, organizational leaders often select high-potential talent based on a direct supervisor’s opinion alone and do not apply consistent definitions of performance and potential. As a result, organizational leaders frequently select the wrong people or include too many leaders in the succession pool.

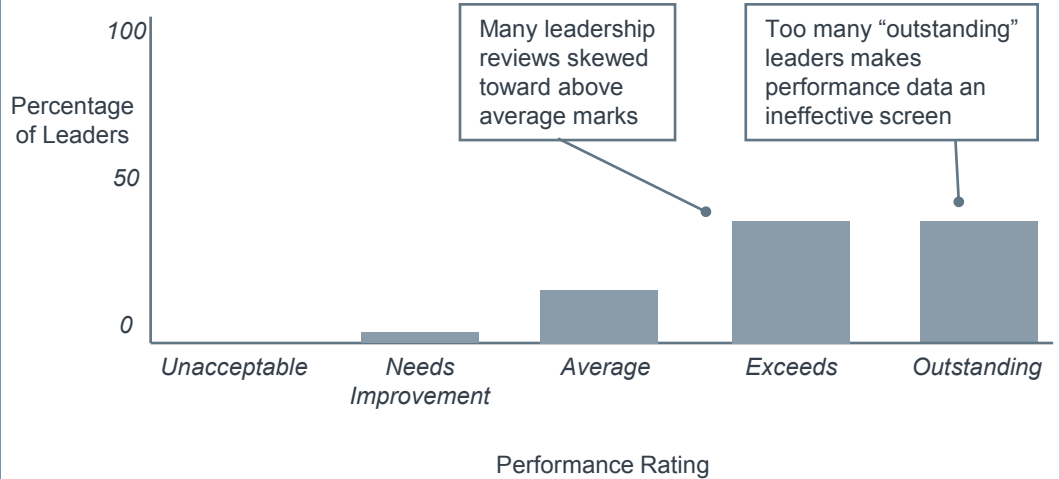
Associated Resources

- Leadership Potential Diagnostic
- Customized Potential Definition Tool
- Hi-Po Calibration Discussion Guide

Ideal succession candidates are among the organization’s top performers and have strong leadership potential. At first blush, leaders should be able to use the annual performance review to identify top performers who may be suitable for succession plans. However, many organizations struggle with rating inflation. When a disproportionate number of leaders receive the top rating, HR leaders struggle to identify the organization’s true top talent.

Unreliable Measurements of Performance

Representative Results from Leadership Performance Reviews



It can be equally challenging to identify leaders with high potential. There are at least three common misunderstandings of potential, each of which is described in the graphic.

The tools in this section will help organizational leaders consistently identify high-performing individuals and create a short list of succession candidates.

A Flawed Understanding of “Potential”

Employee Profiles Commonly Mistaken for High Potential



“Mini-Me”

- Younger versions of current manager
- May not possess leadership qualities needed in the future
- More problematic if current incumbent is underperforming
- Likely to hinder diversity efforts

Years of Service



“Old Faithful”

- Long-time employee; loyal to institution and to manager
- Despite deep institutional knowledge, may never have wherewithal to perform at a higher level, even with additional development



“Ivy League”

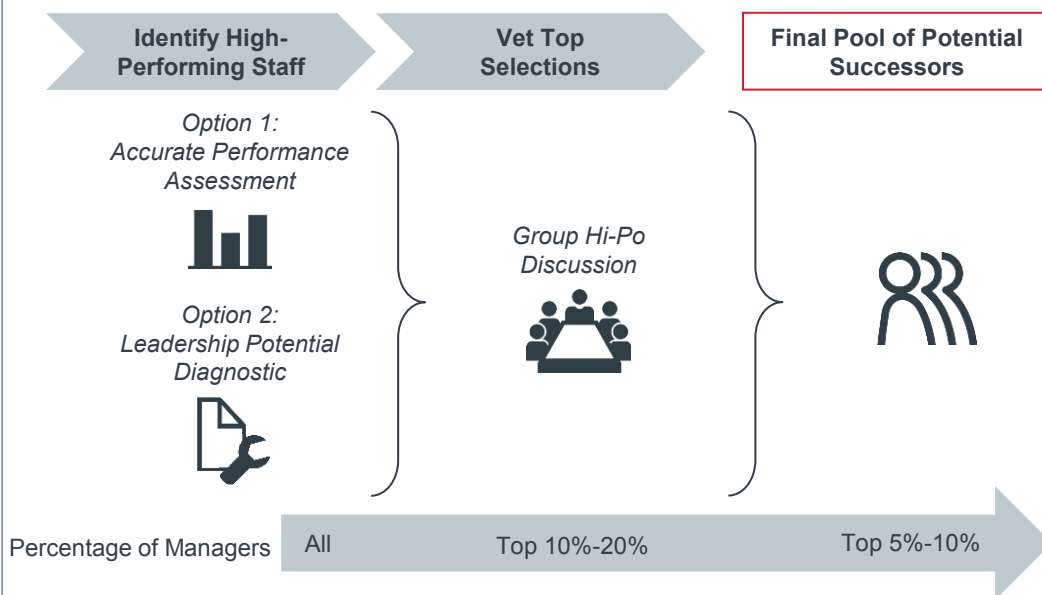
- Highly intelligent; may hold several degrees, accreditations
- Performs well in academia but may not possess business, political savvy required at higher levels

Source: HR Advancement Center interviews and analysis.

Organizations should use two selection screens to identify a small and manageable set of high-potential individuals (hi-pos) comprising approximately 5% to 10% of all managers. The first screen identifies high-performing staff using a common definition of potential, with the goal of narrowing the pool of managers to the top 10% to 20%. The second screen includes a leadership discussion to calibrate assessments and make the final selection of candidates.

There are two options for the first screen. The first option is using performance evaluation ratings. If your organization has an accurate performance evaluation process, you can likely narrow the talent pool to the top quartile of performance based on performance reviews alone. If you do not want to rely solely on performance evaluation scores, you can use the HR Advancement Center’s Leadership Potential Diagnostic, found on page 15. This tool instructs managers to vet current employees against high-potential criteria and can be used independently of performance evaluations. Regardless of the option selected, the first screen will yield a group of high-performing staff eligible for succession planning consideration. In the second screen, organizational leaders vet this group of high-performing staff in a peer forum to arrive at the final list of potential successors.

Two Screens to Isolate Hi-Pos



Source: HR Advancement Center interviews and analysis.

The table below summarizes the two-step screening process for identifying the 5% to 10% of managers to include in the final pool of successors.

Screen	Identify High-Performing Staff		Vet Top Selections
Tactic	<i>Option 1: Accurate Performance Assessment</i>	<i>Option 2: Leadership Potential Diagnostic</i>	<i>Group Hi-Po Discussion</i>
Tactic Overview	Performance evaluation tools employ quantified goals and explicit qualitative criteria to accurately differentiate staff and identify top quartile of high performers.	Diagnostic tool enables managers to identify high performers by evaluating direct reports against standardized set of behaviors believed to demonstrate leadership potential.	Peer managers attend calibration sessions to discuss staff most likely to succeed at next management level and narrow list of candidates to top 5%-10%.
Implementation Considerations	<ul style="list-style-type: none"> Option 1 is most appropriate for organizations with performance evaluations that sufficiently differentiate staff. All others should adopt Option 2. Some organizations adopting Option 1 may wish to further narrow the talent pool prior to the Group Hi-Po Discussion—this is achieved by applying Option 2 to top-quartile performers. Organizations with inaccurate performance data may consider investing in better performance management due to its applicability beyond succession management to retain top performers, drive organization performance, and develop future leaders. 	<ul style="list-style-type: none"> Managers should evaluate direct reports using our Leadership Potential Diagnostic. Managers with large span of control may use personal judgment to narrow the list of those evaluated with the tool. Organizations wishing to create a unique definition of “leadership potential” for the institution or a position can create a customized leadership potential diagnostic tool by following the supplemental instructions. However, ensuring that all managers apply a common definition when evaluating an individual's potential is more important than selecting the most scientific definition of potential. 	<ul style="list-style-type: none"> Annual performance review sessions typically represent the best venue for group hi-po selection. Though these sessions may include evaluation of all direct reports, most of the sessions should be spent narrowing list of highest-rated reports and discussing future career paths. For the difficult task of making final cuts, the group should consider several key differentiators, such as complexity of job or rarity of expertise. A list of key considerations is included on page 20. While this session is intended to identify new entrants to the succession talent pool, session participants should also confirm high-potential status of those previously selected.
Resources	<ul style="list-style-type: none"> <i>Must-Do Steps for Trustworthy Performance Evaluations</i>¹ <i>HR's Guide to Accurate Evaluations</i>¹ <i>The Manager's Guide to Accurate Evaluations</i>¹ 	<ul style="list-style-type: none"> Leadership Potential Diagnostic, pp. 15-17 Step-by-step instructions to create Customized Potential Definition Tool, pp. 18-19 	<ul style="list-style-type: none"> Hi-Po Calibration Discussion Guide, p. 20

1) Access by entering the title into the search engine on advisory.com.

Source: HR Advancement Center interviews and analysis.

Tool: Leadership Potential Diagnostic

Purpose: The Leadership Potential Diagnostic helps managers identify high-potential employees by evaluating direct reports against a standardized set of behaviors believed to demonstrate high leadership potential. A high-potential employee has these attributes: talent, ambition, and engagement to rise and succeed in more senior, critical positions within the organization. Leaders must have all three attributes. This diagnostic helps identify the fraction of employees in the top quartile of performance that are truly high potential.

We recommend distributing this diagnostic to leaders whose direct reports are potential succession candidates.

Instructions:

- 1 Narrow pool of direct reports to top quartile. This can be accomplished through performance evaluations, force-ranking exercise, or, for those without a formalized process, leader discretion.
- 2 Ask individual managers (with direct reports identified as top performers) to complete the diagnostic for each individual within this top-performing subset.
- 3 Once the questionnaire is completed, the manager who completed each diagnostic should calculate the number of “yes” responses for each question. See the Leadership Potential Diagnostic Scoring on page 17 to assess the leadership potential of the employee.

▶ Access this tool: advisory.com/hrac/successionmanagement

Tool: Leadership Potential Diagnostic (cont.)

Leadership Potential Diagnostic

Talent Questions	Responses
1. Does this individual propose sound, defensible solutions to a problem?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Does this individual collect information from all available constituencies and sources prior to drawing conclusions?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Does this individual quickly learn complex concepts and then apply them to his or her work?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Can this individual be an effective and inspirational manager, even with difficult employees?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Does this individual remain calm even in stressful situations?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Ambition Questions	Responses
6. Is it important to this individual to be promoted to a senior leadership position at this or another organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Is this individual motivated by being evaluated against his or her accomplishments, rather than shying away from accountability?	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Is it important to this individual to have his or her expertise in a particular field recognized by other staff and people outside of the organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Is it important to this individual to undertake increased responsibility throughout his or her career?	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Does this individual embrace either formal or informal leadership responsibilities?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Engagement Questions	Responses
11. Does this individual take pride in working for the organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
12. Does this individual compliment the organization when speaking to others?	<input type="checkbox"/> Yes <input type="checkbox"/> No
13. Does this individual strongly believe in the mission of the organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
14. Does this individual make a concerted effort to help others when they have heavy workloads?	<input type="checkbox"/> Yes <input type="checkbox"/> No
15. Does this individual believe that this organization offers the best path for his or her career advancement?	<input type="checkbox"/> Yes <input type="checkbox"/> No

Source: HR Advancement Center interviews and analysis.

Tool: Leadership Potential Diagnostic (cont.)

Leadership Potential Diagnostic Scoring

Category	Number of "Yes" Responses
Talent	_____ / 5
Ambition	_____ / 5
Engagement	_____ / 5

Scoring: Any individuals scoring four "yes" responses or more in all three categories should be included in the small set of high-potential individuals to be considered in the Group Hi-Po Discussion. For further explanation of scoring, please see chart below.

Score (Number of "Yes" Responses)	Employee Evaluation
Talent: ≥4 Ambition: ≥4 Engagement: ≥4	This employee is likely a high-potential employee and should be considered within the Group Hi-Po Discussion to determine if he or she should be groomed for a succession role.
Talent: ≤3 Ambition: ≥4 Engagement: ≥4	Though employee has high ambition and is engaged, his or her skills are average. Unless the organization decides to heavily invest in this individual's skill development, this individual should likely not be a candidate for a critical leadership role at this time.
Talent: ≥4 Ambition: ≤3 Engagement: ≥4	This employee, while talented and committed to the organization, lacks the drive for success at the next level. It is advantageous for the individual and the organization for this employee to stay in his or her current role, rather than being groomed for the next level at this time.
Talent: ≥4 Ambition: ≥4 Engagement: ≤3	This employee, while talented and ambitious, is not fully committed to his or her work or the organization. Unless the organization can pinpoint and rectify reasons for disengagement, this employee is unlikely to be an inspirational leader.
All Other Scores	This employee is not high-potential and should not be considered for leadership positions at this time.

Tool: Customized Potential Definition



Note on Use

This tool is designed to assist HR in organizing a discussion among senior leaders with the goal of identifying behaviors and traits that characterize high potential. This page provides step-by-step instructions to guide senior leaders through the exercise of building a common definition for leadership potential. The next page is a worksheet to be completed by leaders during the group discussion. HR should distill the meeting findings to a final checklist to be distributed to all supervisors to use as the standard criteria when identifying high-potential staff.

Instructions

- 1 Gather a small group of senior leaders who are well known for developing strong leadership pipelines and nurturing top talent.
- 2 Review common misunderstandings of potential:

“Mini-Me”	“Old Faithful”	“Ivy League”
<ul style="list-style-type: none"> • Younger versions of current manager • May not possess leadership qualities needed in the future • More problematic if current incumbent is underperforming • Likely to hinder diversity efforts 	<ul style="list-style-type: none"> • Long-time employee; loyal to institution and to manager • Despite deep institutional knowledge, may never have wherewithal to perform at higher level, even with additional development 	<ul style="list-style-type: none"> • Highly intelligent; may hold several degrees, accreditations • Performs well in academia but may not possess business, political savvy required at higher levels
- 3 Ask leaders to keep in mind a specific individual they consider to possess great potential throughout the exercise.
- 4 Ask each leader to select five to six characteristics of high potential from those listed in Section I of the worksheet on the next page. Blank spaces have been provided for any additional characteristics leaders would like to include.
- 5 As a group, discuss common themes from the suggested characteristics and agree on a final list of five to six traits that best characterize high potentials.
- 6 Ask leaders to identify specific types of talent and list the unique traits that demonstrate potential for each type. Types of talent can be categorized in three ways:
 1. By Level (Manager, Director, Executive)
 2. By Breadth (Technical, Functional, Cross-Functional)
 3. By Job Family (Clinical, Medical, Administrative)

Examples:

• Clinical Leadership Potential	• Corporate-Level Potential
• Medical Leadership Potential	• Cross-Functional Potential
• Executive-Level Potential	

Fill out talent types and corresponding traits in Section II of the worksheet.
- 7 Vet completed worksheet with senior executives for final approval.
- 8 Distribute completed worksheet to all supervisors for use in identifying top talent.

Source: HR Advancement Center interviews and analysis.

Tool: Customized Potential Definition (cont.)

_____ **Potential Checklist**
(Organization Name)

SECTION I: CHARACTERISTICS OF HIGH POTENTIAL¹

<ul style="list-style-type: none"><input type="checkbox"/> Eager to learn about self, others, and ideas<input type="checkbox"/> Frequently volunteers for additional opportunities or expanded responsibilities<input type="checkbox"/> Actively seeks opportunities to improve oneself<input type="checkbox"/> Stays informed about major strategic initiatives both within and outside the department<input type="checkbox"/> Enjoys complex problems and challenges <p>Other</p> <ul style="list-style-type: none"><input type="checkbox"/> _____<input type="checkbox"/> _____	<ul style="list-style-type: none"><input type="checkbox"/> Consistently performs well under first-time conditions<input type="checkbox"/> Shows willingness to learn from feedback and experience; can change behavior or viewpoints as a result<input type="checkbox"/> Quickly incorporates new skills into repertoire<input type="checkbox"/> Open to diversity, multiple sources, and a range of views <ul style="list-style-type: none"><input type="checkbox"/> _____<input type="checkbox"/> _____
--	---

SECTION II: ADDITIONAL TYPES OF TALENT

<p>Type: _____</p> <p>Traits: _____</p> <p>_____</p> <p>_____</p>	<p>Type: _____</p> <p>Traits: _____</p> <p>_____</p> <p>_____</p>	<p>Type: _____</p> <p>Traits: _____</p> <p>_____</p> <p>_____</p>
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► Access an editable version of this tool: [advisory.com/hrac/successionmanagement](https://www.advisory.com/hrac/successionmanagement)

1) Adapted from Lominger Limited, Inc.

Source: Lombardo M, Eichinger R, "High Potentials as High Learners," *Human Resource Management*, 2000, Vol. 39 no. 4: 321-330; HR Advancement Center interviews and analysis.

Tool: Hi-Po Calibration Discussion Guide



Note on Use

Once the top quartile of performers is identified through performance evaluations or the Leadership Potential Diagnostic, we recommend that you narrow the list of candidates to the top 5% to 10% through a Group Hi-Po Discussion. Peer managers should attend these calibration sessions to discuss staff they have identified as most likely to succeed at the next level of management. To help focus the discussion, this tool provides a list of factors to consider when determining which leaders to select for the succession talent pool.

Job Complexity

- How complex is the individual's job relative to others at the same level or in comparable functions?

Goal Complexity

- To what degree are the established goals more or less difficult or complex than other similarly situated individuals?

Collaboration

- Does the individual collaborate with others and build mutual respect beneficial to the organization?

Skill Versatility

- Does the individual use skills and abilities beyond those commonly held by people in similar roles?

Rare Talent or Expertise

- Does the individual possess skills or talent that are rare or uniquely valuable to the organization?

Reflects Leadership Values

- Does the individual model the organization's values?
- Does the individual value diversity and manage a diverse workforce?
- Does the individual enable others to achieve their full potential?

Personality

Does the individual exhibit any of the following negative personality traits?

- | | | |
|--|---|---|
| <input type="checkbox"/> Unsympathetic to others | <input type="checkbox"/> Has trouble keeping sensitive information confidential | <input type="checkbox"/> Micro-managing |
| <input type="checkbox"/> Frequently loses self-control | <input type="checkbox"/> Intimidating | <input type="checkbox"/> Unable to adapt to boss |
| <input type="checkbox"/> Easily excitable | <input type="checkbox"/> Abrasive style | <input type="checkbox"/> Does not model organization's values |
| <input type="checkbox"/> Responds poorly to criticism | <input type="checkbox"/> Appears cold, aloof | <input type="checkbox"/> Seen as untrustworthy |
| <input type="checkbox"/> Does not display humility | <input type="checkbox"/> Overly ambitious, plays politics | |
| <input type="checkbox"/> Speaks without thinking | | |