

Succession Planning: A Necessary Process in Today's Organization

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Abstract—Today's environments are changing rapidly that organizations are facing serious unpredictability and uncertainty, which sometimes causes instability in the business operations. In this unstable environment, organizations need to rely on the most important assets: their people. Organizations need to strategize to motivate and connect their employees in order to create competitive advantage and achieving higher profitability. Organizations may consider methods like succession planning and management to promote their employees' knowledge, skills, talents, and capabilities to tackle problems created by the challenging environments. The purpose of this paper is to provide a general view in succession planning and management by reviewing the most relevant researches in this field. This comprehensive review is useful for organization managers to select and tailor succession planning approaches which best suit their organizations. In particular, this paper will benefit researchers who are interested in studying succession planning and management.

Index Terms—Human resource management, succession planning and management, succession planning programs.

I. INTRODUCTION

Historically, the organizational deliberate was on replacing key employees exactly before they leave the organization [1]. Replacing employees and not developing them was a big and common mistake by organizations. In addition, there are many problems arising from the replacing process. For example, in many cases, it is hard to find the right employee for a new vacancy in a short period of time. Furthermore, if organizations could not find a right person inside their organization, they must hire him/her from outside, and this will cost more for the organization [2]. Through the years, organizations have realized that they can discover their future managers and leaders inside their own organizations. They also, find out that using tools such as succession planning can help them be confident on having their future potentials' needs [3].

An important issue in the field of human resource management is succession planning. Finding the methods of developing the talent management programs and finding the important elements of succession planning programs is the concerns of many researches [4].

Several researches and studies about succession planning have been conducted during the past decade, however,

succession planning and management as we know it today, began in the late 1960s and the early 1970s, when leading-edge organizations adopted formal succession planning methods [5].

II. SUCCESSION PLANNING

Organization's future plans may change by some reasons such as retirements, promotions within the organization, serious illness, death or any voluntary departure from the organization to follow a career elsewhere. To cover such changes, organizations must have a key employees' replacement plan. Succession planning is considered as a suitable effort in this regards[6].

For decades, the concern of succession planning was about the exact people, not skills and talents, who are needed for the organization's future[7]. During those times, the only purpose of succession planning was to tag and identify the needed successors to replace their ancestors for a specific job. The target of succession planning in this old view was top leaders and business owners in the large organization[8]. Traditionally, succession planning links with replacement planning[9]. Replacement planning is a form of risk management [10] which focus on the replacing the key executive, exactly before leaving the organizations [11].

In today's dynamic world where competition is high, work is fluid, environment is unpredictable, organizations are flatter, and the organizational configuration frequently changes, the old view of succession planning by defining specific people for the specific job does not work. Nowadays, organizations need a group of high potential people at all levels of their organizations. Developing general competencies, creating flexibility and creating the leadership potential at all organizational levels is a wisely action in today's organizations[12].

Some researchers explained succession planning as a systematic effort to help managers, who needs to identify a pool of high-potential candidates, develop leadership competencies in those candidates and then select leaders from the pool of potential leaders. Others have referred to it as a strategic, systematic, and deliberate activity to ensure an organization's future capability to fill vacancies without patronage or favoritism[13].

In a general definition, succession planning is a fundamental structure that takes into account the organization's resources for the protection and development of high potential employees[14]. Realizing the importance of succession planning in organizations, a comprehensive view in the advancement of succession planning and management from the 1950 to 2010 is reviewed by this paper.

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III. SUCCESSION PLANNING STUDIES (1950-1959)

Zaich (1986) stated that there are few empirical studies of succession between 1950 to 1960. In this period of time most researches focused on management development or chief executive officer (CEO) succession[15]. It means that, at those times, most of the researches focused on CEO succession rather than succession planning.

In an initiating research of the succession-planning event, Christensen (1953) suggested some elements which would be included in such a planning process. According to him, these elements are identifying the pool of potential successors, the actual designation of the successor, and the notification of both the successor designated and other major power figures[16].

In 1954, Chapman evaluated the "state-of-the-art," and determined the five common elements in executive development programs. These elements included a defined organization plan, performance appraisal, established replacement tables, development of high potentials, job rotation, and training programs. Additionally, before Chapman, in 1947, Asbury investigated business and industry practices that had to do with personnel administration at the executive level. His research included 53 organizations and he identified five common elements in their formal plan for executive development. These common elements include organization analysis, selection, evaluation, development of executive level talent, and inventory control. The findings from these two studies seem to be applicable in today's organizations[17].

IV. SUCCESSION PLANNING STUDIES (1960- 1969)

Grusky (1960) forwarded the vicious-circle theory that the event of succession as bringing trouble to the organization and the relationships among members of the organizations. The rate of chaos through changes in policies and practices make known by the new leader is a part of the vicious circle[18]. The most relevant study in succession planning and management in the 1970s were accomplished by Trow (1961). He researched the proportion of succession into top positions in 108 small companies and concluded that companies who prepared for succession were less likely to experience financial difficulty during executive turnover. In addition, a strong connection between planning for succession and profitability of an organization was another finding of his research[15].

V. SUCCESSION PLANNING STUDIES (1970-1979)

During 1970 to 1979, the Coleman's research is the only study which is more related to the issue. Colman in 1970 demonstrated the usual approach discovered in manpower planning. He illustrated almost similar elements in which Asbury (1947) and Chapman (1954) had explained. The common elements among these three studies are the definition of organization objectives and plans, determination of gross manpower, requirements for the planning period, assessment of in-house capabilities, determination of net human resource requirements to meet

organizational goals, and development of an action plan and program to meet the objectives[15].

VI. SUCCESSION PLANNING STUDIES (1980-1989)

Kesner and Sehora (1994) and also, Zaich (1986) stated that from 1980, succession planning received greater attention than the previous years. For example, Carnazza in 1982 researched fifteen companies in succession/replacement planning program. He supposed that the purpose of succession/replacement planning programs was to ensure the development of an adequate number of qualified work-force to key professional and managerial key positions which may fell vacant in the future. The purpose of this research was to examine how companies achieve the objectives of succession /replacement planning programs. He concluded that interests to have formal succession/replacement planning in larger companies are more than small companies. Companies should also, recognize that they need time, perhaps as long as five years to implement a succession/replacement planning program and to realize benefits through such a program. In addition, he explained that succession/replacement planning link candidate's potential to position needs. In his model, he identified procedures which are needed to achieve two essential objectives of succession/replacement planning program: deciding the position to be covered which concerned the process of identifying important positions, and the person to be included which includes the process of managing essential managers[19].

The other study in this period was Mahler's study (1983). He reviewed succession planning in sixty firms and stressed the need for succession planning. In addition, he stress the need and the advantages of improving succession planning[20]. In that year, Mahler and Graines considered the research done by Asbury in 1947 as the first formal report. They studied the formal executive development programs in large companies and reported the common elements stated by Asbury in 1947[21]. Leadership Pipeline is a concept in a model also, created by Mahler that contributed a lot to human resource planning and succession planning. The focus of Leadership Pipeline Model is on leadership development rather than succession planning and management. His approach laid the basis for the modern succession planning approach[17]. The pipeline is not a straight cylinder but rather a one that is bent in six places. Each passage shows a change in organizational situation - a different level and complexity of leadership - where a major turn has to be made. The main concerns of these turns are the change in job requirements, demanding new skills, time applications, and work value.

Rhodes and Walker (1984) reported a survey research, called the TPF&C (Towers, Perrin, Forster and Crosby) study which involved 30 large corporations. The purpose of the research was to examine and analyze the management succession and development planning practices at that time. They documented four different approaches to management succession and development planning. These are informal, decentralized, centralized, and integrated. According to Rhodes and Walker (1984) organization structure and

management style, size and wealth of the organization, and the company's growth rate are factors that affected the selection of the approach. They also identified the six techniques that were used in implementing the programs. These techniques are senior management involvement, information requirements, assessment, management review, developmental techniques, educational training[22].

One of the important researches in 1984 has been done by Friedman. The important aspect of his research was obviously differentiating between the researches subjects of succession planning, and CEO succession. The previous researches mainly have focused on CEO succession. Moreover, he defined succession planning as a succession system, which is an ongoing process. Furthermore, his research was the first which attempted to examine succession planning and its effect on organizational performance or outcomes. Friedman explained that a succession system in large corporations is characterized into seven dimensions including formalization, control system, resource allocation, information systems, political criteria, technical criteria, and staff role. Although the main hypothesis of his study was not confirmed, Friedman suggested the following implications based on the detailed results of the study. First, for an effective succession system, CEO involvement is essential. Second, human resource review was a crucial process in the succession system. Third, the internal staff's role in the management of the succession system is necessary. The staff must do the background work facilitating, coordinating, but not leading. Fourth, a well-developed cadre of management talent is essential for an effective succession system. Fifth, human resource strategy and business strategy should be integrated[23].

Hall (1986) emphasized on the significant roles of learning and development of management on preparation for succession plans. Pattan (1986), Sheibar (1986) and Kesner (1989) integrated strategic human resource literature with succession planning. They explained that succession should be planned to match managers with strategies, and plans should be specific when the chart of positions shifts[20].

VII. SUCCESSION PLANNING STUDIES (1990-1999)

From 1990's most organizations figured out the necessity of succession planning and implementation of effective succession planning that fit their own organizations. Therefore, research in this period expanded to other business organizations, such as educational institutions, government, non-profit organizations, healthcare, and small businesses[10]. At the beginning of this decade, Zajac in 1990 researched on CEO selection, succession, compensation and firm performance. One of his hypotheses was related to succession planning. As a result of testing that hypothesis, he stated that firms in which CEOs had a specific successor in mind tended to be more profitable than firms in which CEOs did not have a specific successor in mind[24].

In 1999, a model of succession planning in the family-owned business was forwarded by Matthews, Moore, and Fialko. They developed a theory of leadership succession in the family firms. They indicated a general leadership succession model which included the process in which both

the parent/leader and the child/successor accessed each other and themselves through the cognitive categorization process. Their paper assumed these classifications influenced the succession process. Here, the parent/leader prepare the child/successor for leadership and the child/successor determine both the suitability of supposing leader and his or her readiness to accept the succession[25].

Eastman (1995) researched the effectiveness practices in succession planning. He illustrated that a succession management program should receive visible support from the CEO and top management be owned by line management and supported by staff, be simple and tailored to unique organizational needs, be flexible and linked with the strategic business plan, evolve from a thorough human resources review process, be based upon well-developed competencies and objective of candidates; Incorporate employee input. be part of the broader management development effort, include plans for development job assignments, be integrated with other human resource systems, and emphasize accountability and follow-up[26].

Davis and Harveston (1998) used Christensen's elements (1953) as the variables and developed a model which explored the relationships between individual-level characteristics, group-level variables, organizational-level characteristics, and resources on the succession planning process. The individual level of Davis and Harveston's model included demographic characteristics of the manager who controls predictive validity regarding critical organizational processes. The group level considers the family member's involvement and its influence over the organizational processes. The organizational level of the model analyzes the organizational attributes such as size and formality, which can influence the organization's succession planning processes. Resources were the final level of the model. Capitals might provide demand of succession plans before extending credit or lending money to the organization. The outcome of Davis and Harveston's model showed that succession was not an event but a process which was influenced by many variables within and external to the organization[27].

Another popular theory in this era was Agency theory which explains organizational behavior and succession planning. Agency theory dealt with the cooperative relationship which developed when one individual in an economic exchange (the principal) granted authority to another (the agent) to act on his or her behalf, and the welfare of the principal became affected by the decisions of the agent[28]. The main concern of this theory was that the welfare of the principal might not be maximized because the principal and the agent tended to have different aims as well as contradictory predispositions toward risk[29].

VIII. SUCCESSION PLANNING STUDIES (2000- 2009)

There are several researches of succession planning and management after 2000. Baruch and Peiperl (2000) in their survey of 194 UK-based companies explained that succession management is an important characteristic of effective career management. Baruch and Peiperl categorized succession management as active planning along

with performance reviews, counseling by managers and human resource. In their analysis, they observed that these active planning processes were strongly related with dynamic, open and proactive climates, and were especially associated with organizations that relied heavily on internal labor markets[30].

Huang (2001) studied succession management systems and human resource outcomes. The purpose of the study was to investigate whether local firms with a more sophisticated succession plan achieved more favorable human resource outcomes than those with less sophisticated plans. He concluded that there is no significant difference in human resource outcomes between companies which adopted succession planning and those who did not. However, he argued that there is an important relationship between the level of sophistication with which succession plans were carried out and human resource outcomes. In addition, he found out that line-manager involvement, non-political succession criteria, the credibility of succession planning staff, review and feedbacks, effective information systems are some characteristics which affected the performance of human resources[31].

Lynn (2001) focused on four elements as the key elements of the succession event. These elements include succession contingencies (industry issues, organizational characteristics, and selector variables including incumbent and board power), succession antecedents (initiating forces for CEO departure, CEO roles, and candidate issues), the succession event (process, candidate, and choice issues), and succession consequences (organizational effectiveness, stakeholder issues, and evaluation outcomes)[32].

Charan, Drotter and Noel (2001) suggested an alternative definition for succession planning from the leadership Pipeline Model which was introduced by Mahler & Graines (1983). In their definition, succession planning is perpetuating the enterprise by filling the pipeline with high-performing people to assure that every leadership level has an abundance of these performers to draw from, both present and in the future[9]. In addition, a five-step plan for succession planning was recommended by them. In the first step, the organization tailors the leadership pipeline model to fit their organization. The second step is to translate standards for performance and potential into their own language. The third step involves documentation and communication of the standards set in the previous step during the organization. In the next step, organizations evaluate succession candidates through a combined potential-performance matrix. A matrix used in this step is similar to GE's nine-block diagram. The final step is to review the plans and progress of the entire pipeline frequently and seriously.

The Seven-Pointed Star Model is a famous model developed by Rothwell (2001) to achieve the systematic succession planning and management. Seven steps in this model are: Make the commitment, assess the present work/people requirements, appraise individual performance, assess the future work/people requirements, assess individual potential, close the development gap, and evaluate the succession planning and management program. In this model, he gave details of each step in these orders: In the first step, the organization's decision-makers should commit to

systematic succession planning and management. In the second step, decision-makers should consider the present work requirements in key positions. This is the only way for individuals to be prepared for advancement stability grounded in work requirements. In this step, decision-makers should explain where key leadership positions exist in the organization and should apply one or more approaches to determine work or competency requirements. In the third step, evaluating that how well individuals carry out their jobs is very important, because most succession planning and management programs suppose that individuals must be performing well in their present jobs in order to succeed for advancement. Hence, in this step, the organization should begin establishing a list of talents, to have a clear idea of the existing human assets.

In step four, competency requirements in key leadership positions in the future need to be identified. To do this, decision-makers should make an effort to assess future work requirements and competencies. In that way, future leaders may be ready to cope with changing requirements. The fifth step concerns the assessment of individuals' future potential and its match to their future work requirements. The organization should create a process for assessing future individual potential. That future oriented process should not be confused with past/present-oriented employee performance appraisals. In the sixth step, the organization should establish a continuing program for leadership development to grow future leaders internally. Alternatives to traditional promotion-from-within methods of meeting succession needs should also be searched by decision makers. Finally, to develop the succession planning and management program, it must be subjected to continual evaluation to determine how well it works. That is the seventh and final step of the model, and the results of the evaluation should, in turn, be used to make program refinements and to maintain a commitment to systematic succession planning and management[10].

Byham, Smith and Paese (2002) suggested a different approach to grooming executive talents. Rather than targeting one or two hand-picked people for each executive position, an accelerate pool with focus on the development of a group of high-potential candidates for executive positions was proposed. The model highlights the accelerate development of pool members during stretch jobs and task-force assignments. The model offers the best learning, including mentoring, coaching, training, and special developmental activities such as university executive programs and in-company action learning sessions, and also, highest visibility opportunities. Byham explained the process of the acceleration pool in five phases. The five phases of the acceleration pool are identifying high potentials, diagnosing development opportunities, prescribing solutions to development opportunities, ensuring that development takes place/documenting development, and reviewing progress and new assignments[33].

Kim (2003) in his study concluded that succession management practices should emphasize employee self-improvement by promoting cross-functional and cross-sector job assignments, executive coaching and mentoring[34]. In the same year, Conger and Fulmer put

forward five rules for succession management. The first rule is that succession management must be a flexible system oriented toward developmental activities. This is the fundamental rule that other rules are based on. The focus of second rule is on jobs that are essential to the long-term health of the organization. Making succession management transparent, not a mystery, defines as a third rule. Rule four is the usual measurement of progress, moving away from the alternative mind-set of succession planning. Keep it flexible is the final rule[35]. Conger and Fulmer (2003) argued that the effectiveness of a succession management system is strongly depending on its respond to the needs of users. In addition, it depends on the easiness of its tools and processes for using and providing the reliable and up-to-date information[35].

Hunte-cox (2004) examined the relationship between executive succession planning and the collective learning capacity. Her model contained four variables for succession planning which include strategic goal, corporate value, core competencies, and leadership and management development. In addition, he considered four variables for organizational learning that were driven from Schwandt's organizational learning model which include environmental interface, action/reflection, dissemination, diffusion, meaning, memory and their action. The result of this quantitative research showed that organization which scored highly in executive succession planning scored highly in organizational learning. Specifically, executive succession planning had a significantly high positive correlation with organizational learning capacity[36].

Succession plans and their effect on the promotions of women is the study conducted by Stroud in 2005. The purpose of this study was to assess the role of succession plans in corporations and its effect on women's promotions. For this purpose, Stroud interviewed some senior female managers in firms that had succession plans. The results of this study showed that those women who have attained the senior management positions within selected companies have worked hard to move up the career ladder. As one of the major findings, he clarified many factors which contribute to the promotions of women who are seeking for senior positions. The most important factors were: work ethic, education, sincerity, trust of others, caring attitude, ability to work as teams, and sharing credits[37].

Dingman (2006) did a case study on servant leadership role in the succession planning process. A positive relationship between servant leadership principles and the succession process was shown through the examination of the succession process in a servant-led organization[38].

There are more studies from 2007; for example Shipman in 2007 studied succession planning in healthcare organizations. He focused on meeting leadership needs in a changing American workforce. This qualitative study investigates succession planning management in four Kentucky healthcare organizations as it relates to the changing workforce demographics. This research study examined how the four Kentucky healthcare organizations identify potential leaders, use mentoring to address succession plans, retain employees and prepare for workforce diversity, and develops leaders within the organization. The findings reflect the need

for healthcare organizations to create formal succession plans to address workforce and leadership shortages[39].

Krauss (2007) studied succession planning and talent management to provide recommendations to reduce workforce attrition and prepare for an aging workforce. As a result of this study, the recommendations to the organizations were to implement a structured succession plan which distinguished the importance of establishing ownership of the succession plan and aligning the internal culture with external branding. These recommendations included identifying, assessing and developing high potential in the organization. Once high potentials are selected, their development plan needs to include a job rotation program, a formal mentoring/coaching program, utilizing 360 feedback tools and receiving an appropriate reward for performance[40].

Another qualitative study in 2007 was carried out by Fancher on 30 participants of executive and mid-level managers from 500 companies. The study was to investigate the influence of organizational culture on the succession planning process. The results showed that an organizer has powerful influence on organizational processes (i.e., succession planning) through the culture which he or she created early on[41].

On the other side, Olson (2007) did a qualitative research on non-profit workforce succession planning. This research investigated the necessity of non-profit workforce succession planning to meet the demands for the project growth and development of programs and services for the aims of serving a growing population of adults primarily age 55 and older. He concludes that in order to adaptive job for talented people, leaders must assess reality and clarify values[42].

Further, Groves (2007) did a research with the aim of presenting best practices model for optimal development of the leadership pipeline and giving a series of practical recommendations for organizations. He concluded that best practice organizations effectively integrate leadership development and succession planning systems by fully utilizing managerial personnel in developing the organization's mentor network, identifying and codifying high potential employees, developing high potentials via project-based learning experiences and manager-facilitated workshops, establishing a flexible and fluid succession planning process, creating organization-wide forums for exposing high potential employees to multiple stakeholders, and establishing a supportive organizational culture. He also identified six methods as the best practices in leadership development include: 360-degree feedback, executive coaching, mentoring, networking, job assignments, and action learning[43].

Mandy (2008) did a case study and introduced some indicator for succession planning which include the ability to identify new leaders, the ability to develop new leaders, the ability to deliver financial success, the ability to foster a positive organizational culture, the ability to maintain long-term viability, the ability to sustain core competencies, the ability to initiate change management[44]. Levitz studied succession planning and leadership development in 2008 argued that leadership development and succession planning must be at the core of strategic planning[45].

Romejok (2008) did a study with the aim of determining the key characteristics of a succession-planning program at a government research center. A set of characteristics that could be used to create the framework for a succession plan at a government research center were recommended as a result of this study. These characteristics were grouped into two categories, institutional characteristics and employee characteristics. The recognized institutional characteristics are the creation and maintenance of a talent pool, the requirement to ensure that the program is held to ethical standards, and the desire to instill some measure of flexibility into an inherently bureaucratic and inflexible system. The employee characteristics that were recognized were to ensure a complete program for the job development for each participant which included career planning, mentoring, and training[46].

Kasper (2008) examined the impact of organizational communication in the administration of succession planning program. His major suggestion was that organizations need to perform critical internal examinations of their current methods and strategies for the communication of their succession planning program[47].

Cheryl (2009) recommended strategies for implementing deliberate and systemic succession plans in the academic environment via a research in higher education institutes. These strategies include securing executive champions, aligning the succession plan to institutional culture, mission, vision and goals, taking an approach not unlike strategic planning, carefully constructing communication plans to embrace talent development without inferring entitlement, and a continuous evaluation of both the people and processes involved in succession planning[48].

IX. CONCLUSION

The matter of the fact is that surviving and prospering in the current challenge environment require reviewing the succession planning and management in the organizations by managers before reactively promoting or shedding staff. Since succession planning and management is a process and a system, like any other human resource activities it need to be properly implemented in business organizations. As pointed by the researches in the review, there are benefits and returns achieved by firms that had implement successful succession planning and management. Those organizations that already have a succession planning and management program in place must focus on overcoming their exclusive obstructions to a best practice system. Those organizations which do not presently invest in succession planning and management system should perhaps consider it seriously; assessing the needs, requirements, and appropriateness of implementation.

This paper could not present all researches in the area, but provides a general view of succession planning and management. The important researches in succession planning have been reviewed, and the process of development of succession planning can be followed and tested. However, we cannot point out a single model for all types of organizations, as each research topics which were reviewed can be tested in different organizational settings.

The process, steps of implementation, and factors which influence in or affected by succession planning need to be analyzed in various types of organization with different jobs, responsibilities and cultures.

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