Measuring the Success Metric for Effective Succession Planning: The Conceptual Perspective

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Abstract

This conceptual study aims to explore the evolution of succession planning by focusing on a systematic procedure and highlighting the instrument of success metric that influences succession planning effectiveness. There are several approaches to discuss the succession planning process and the effectiveness of the used methods. However, no single systematic process applies to the entire organization. Besides that, this research includes a literature review, focusing on key success metrics of succession planning. The metrics used to track succession planning effectiveness should be directly related to the organization's strategic goal. Therefore, the metrics must be clearly defined and articulated as part of the organization's formal succession plan. This study reveals three key success metrics of succession planning: (1) bench strength, (2) time-to-fill, and (3) talent turnover. A good success metric indication will allow a company to analyze the impact of a succession plan in retaining talent in the pipeline as a proactive strategy.

Keywords: Succession Planning Process, Success Metric, Leadership, Talent Pool.

1. Introduction

1.1 Research Background

Filling vital executive leadership positions with qualified and motivated candidates is not an

easy task for many organizations (Chang & Besel, 2020). One of the issues facing business organizations these days is producing a leader from within the organization's talent pool who can fit into a set of duties and procedures for the next level of leadership (Aboradi & Masari, 2018; Jackson & Dunn-Jensen, 2021). Succession planning is a technique for ensuring that the company has a plan in place to ensure that the organization's continuity is maintained when the executive director, senior managers, or talented people leave. Succession planning is not about crowning the next CEO before the right time but building a systematic process, which involves the board and senior management in the discussion (Aboradi & Masari, 2018). systematic and long-term practice of succession planning will ensure that an organization has the necessary pool of talent to enable it to meet its business objectives and achieve its mission (Rothwell, 2016). In some instances, the plan could be considered invalid when a person who has been identified as a successor fails to live up to the expectation or resigns unexpectedly.

Effective succession planning helps boost the confidence and understand each employee's purpose and what drives them to achieve business goals. A systematic process of succession plans was most effective when it was designed within an evaluation framework, education, and growth plans in order to measure progress and success, as well as provide any evidence to support changes to the succession planning process and leadership development (Abdellah, 2021). This systematic process also has an impact on the organization's succession plan, which aims to create future leaders. As a result, the idea of a structured succession planning process in which leaders are categorized according to an internal definition of future potential and placed on bench lists for certain tasks has emerged. In line with the organization's objectives, the succession planning process has also been improved, including the family business, SMEs, non-profit organizations, education, and the private sector. Various succession planning processes have been established, but the most essential element is measuring the effectiveness and outcomes. The element of measuring effectiveness is very much related to the scope of the succession planning success metrics. The succession planning process primarily focuses on identification and development, with little attention paid to the evaluation phase, particularly in terms of success metric measure.

1.2 Succession Planning Has Changed and Evolved Over Time

The concept of succession planning is undergoing changes in today's increasingly dynamic organizations. Many organizations constantly go through restructuring, reorganization, and business strategy changes. This research shows how succession planning has evolved, from the 1950s to the 2010s. Henri Fayol introduced succession planning in 1916, believing that if the succession plan is disrupted, the organization would not make the necessary transition (Rothwell, 2016). Henri published Administration Industrielle et Générale in 1916, in which he developed 14 management principles. These concepts, which were first defined in the early twentieth century and are still commonly held today, indicate that management is responsible for ensuring the "stability of tenure of personnel. If that need is not met, Henri believes that crucial roles will be filled by people who are not prepared.

Kesner & Sebora (1994) explored three stages of the succession planning phase. The first phase spanned the decades of the 1950s and 1960s. The beginning of scope research can be

regarded as the early development between the 1950s and 1960s. Next, the focus on succession planning is then expanded in the context of theory development to emphasize the importance of succession planning in organizations, as well as the discovery of finding through empirical study among researchers to support the relationship to existing theories. This change happened during phase 2 in the 1970s. Review and explosive growth characterize the final period, which ran in the 1980s. Next, the early 2000s involved the change from technology‐based employment planning to a focus on manpower towards a more comprehensive human resources planning strategy (Jackson & Dunn-Jensen, 2021; Parfitt, 2017).

1.2.1 The 1950s–1960s: The Emergence of Succession Planning

The origins of succession planning have been extensively debated in academic research. Throughout the 1960s, Grusky explained a number of critical concerns about the subject. Grusky (1960) was a pioneer in identifying essential aspects in succession planning, designing a research study approach. During the 1950s to 1960s, research focused on the origin of the successor and the frequency of succession to ensure that both criteria had a substantial impact on the succession plan's implementation. At the same time, the study was also expanded comprehensively by identifying the characteristics of succession required in holding strategic positions and grouped in talent clusters. Similarly, emphasis is given to the role of the board in supporting and influencing the implementation of the succession plan. Furthermore, instead of focusing just on the causes and consequences of succession planning, academics in another scenario began to explore the equally important aspects of decision-making and the development of succession frameworks and typologies (Kesner & Sebora, 1994).

1.2.2 Succession Planning in the 1970s: Theory Development and Empirical Research

Due to numerous difficulties and needs of the organization, the scope of succession planning studies grew and expanded by the 1970s. Research not only focused on the succession plan's origins and administrative framework but also the overall implementation process. Redlich (1977) and Greenblatt (1978) demonstrated the existence of studies with a broader scope by focusing on processes and identifying and outlining the steps of succession plans that must exist for them to be implemented in organizations (Kesner & Sebora, 1994). The study also discovered that the stages in the process of succession plan implementation vary in quantity and that a standard cannot be established; however, both studies reveal that the stages remained consistent in type.

1.2.3 In the 1980s: Review and Rapid Expansion Describe the Succession Planning Process

The 1980s was an era of reflection among succession planning researchers. The study of succession plans has evolved into strategic planning integration, which takes into account future change expectations. Gordon & Rosen (1981) discovered aspects such as pre-arrival factors, which include the fit of the successor's characteristics with the post, as well as the skill and work experience in managing the organization. Post-arrival factors primarily concentrate on the process of observation and monitoring, both of which are components for

future succession plan studies' adaptation. Kohler & Strauss (1983) also briefly surveyed the literature on succession planning. The necessity for enhanced term clarity was one of their main recommendations. The authors also argued that succession might not be a straight line. To put it another way, the succession process may flow easily from one step to the next.

1.2.4 In the 2000s: Integrated Succession Planning to Human Resources Planning Strategy

In the 2000s, the concept of succession planning has evolved, involving changing from technology based employment planning to a focus on manpower towards a more comprehensive human resources planning strategy (Barr, 2019; Jackson & Dunn-Jensen, 2021; Parfitt, 2017). However, the core components continue to be present although the focus on succession planning has changed over time (Chavez, 2011). Furthermore, the alignment of a development plan with a succession plan seen as signals a move away from the previous succession system's "replacement" approach and toward a methodical strategy that focuses on long-term planning to nurture and develop future leaders. The emphasis on this component of integrated development will highlight the organization's efforts to develop competent people by purposefully placing someone in their position, or 'the right person for the right job' (Conger & Fulmer, 2004).

1.3 Definition of Succession Planning

It is challenging to find a standard and generally accepted succession planning definition. A diversity of definitions of succession is important because it allows us to distinguish the various types of succession and identify the roles in succession planning. In the literature, interchangeable words are used to describe succession planning for an organization in various contexts and scenarios. Alternative terms include leadership development, talent management, leadership continuity planning, replacement planning, and career development (Carriere et al., 2009; Crumpacker & Crumpacker, 2007; Song & Thompson, 2011). Thus, this situation gives rise to the ambiguity of the succession planning concept due to the inconsistencies and standards of terms agreed in the literature.

Succession planning is defined as a systematic process in which individuals are matched to critical positions with continual development and growth plan of employees in order to ensure that key positions maintain some level of stability, thus enabling an organization to achieve business objectives (Atwood, 2007; Calareso, 2013; Rothwell, 2016). Moreover, there is a discussion about how critical positions are described in succession planning, with some organizations focusing primarily on top positions. Meanwhile, some argue that the focus of the succession planning should also include the provision of middle management and supervisory level positions as part of a more comprehensive long-term strategy for sustained leadership development (Berchelmann, 2005; Berke, 2005; Calareso, 2013; Rothwell, 2016).

According to Orellano & Miller (1997) defined succession planning as identifying critical management positions within the organization, identifying future vacancies in those positions, and identifying managers who would potentially fit into these vacancies. In addition, Garman & Practice (2004) defined succession planning as a structured process involving identifying

and preparing a potential successor to assume a new role. By "structured," they refer to a process with some reliable structure and/or custom, thereby excluding from the definition the more ad hoc or "just-in-time" identification of successors. The "identification and preparation" component of the definition is purposely left undefined in terms of specific methods in order to reflect the full heterogeneity of current practice.

A prominent researcher in succession planning, Rothwell (2005), define succession planning as an organizational, systematic, and deliberate effort to ensure leadership continuity in key positions, retain and develop knowledge capital and intellectual for the future, and encourage people for development. In the late 2000s, various authors have developed the definition of succession planning. Succession planning is a systematic, proactive, and ongoing process. Table 2 lists a detailed breakdown of the essential elements in succession planning.

Table 2. Major elements used to define succession planning

The Main Definition Elements	The Elements	References
Succession Planning is a **process**	Process/activities	Noe et al. (2000), Huang (2001), Conger & Fulmer (2003), Runestad (2014)
	Proactive process	Collins and Collins (2007), Gabour Atwood (2007), Rothwell (2016), Fink & Brayman (2006), Zepeda et al., (2012)
	Systematic process	Garman and Glawe (2004), Rothwell (2010), Adewale et al. (2011), Kim (2012), Davis (2019)
	Deliberate/intentional process	Rothwell (2010), Kim (2012), Weisblat (2018)
	Ongoing process	Dessler (2020), Atwood (2020)
	Forecasting/long term view process	Luna (2012), Davis (2017)
Identifying **position**	Key positions	Rothwell (2016)
	Key leadership positions	Darvish and Zahra (2014)
	Critical management positions	Orellano & Miller (1997)
	Key roles	Conger & Fulmer (2003)
	Key managerial or professional positions	Adewale et al. (2011)
	Key players	Noe et al. (2000)
For identifying, developing **people**	Identifying, developing, and retaining	Davis (2017)
	Mentoring, coaching, and grooming	Kim (2012)
	Knowledge transfer	Buckway (2020)

To **fill in** the vacancies	Fill in the vacancies	Kim (2012)
	Potentially fit into vacancy	Orellano & Miller (1997)
	Replace key players	Noe et al. (2000)
	Ready to move/preparing into those roles.	Atwood (2020)

This study also discovered that the succession planning can improve the predictability of people analytics by recognizing internal talent within organizations that are highly motivated and well suited for critical position.. Succession planning also assists and develops people professionally so that they can be candidates for future leadership positions, ensuring that organizational performance remains stable and that there are no organizational problems that might be caused by the sudden vacancy of the key position in the organization.

2. Methodology

This research reviews the literature primarily related to revolution in the history of succession planning, systematic process, and succession metric instrument in measuring the effectiveness of succession planning. The literature has been divided into an evolution stages, various definitions of succession planning and systematic process of succession planning. This review also covers performance indicators in success metric consisting of (1) bench strength, (2) time to fill, and (3) talent turnover.

3. Process of Succession Planning

Succession planning is a process that not only ensures the stability and tenure of key personnel but is also perhaps best defined as any effort to ensure the continued effective performance of an organization, division, department, or workgroup by providing for the development, replacement, and strategic application of key people over time (Ali et al., 2019; Rothwell, 2016). The main purpose is to have a pool of qualified candidates for the key position. Implementing an effective succession plan requires a systematic process (Badawy et al., 2016; Morrin, 2013). This systematic process distinguishes succession planning from replacement planning. An effective plan process will result in quality leadership. Effective leadership in key positions is critical to the success of any organization. According to Khanaman et al.(2020), meaningful positive relations between each decision-making style and organizational structure become stronger and more effective when strategic succession planning in action mediates their relation, confirming the assumption that operating the succession planning can strengthen the relations within the organization.

For a long time, the succession plan process has always changed, whether due to environmental factors, direction, organizational culture, structure, or demographics of employees. Kesner & Sebora (1994) explained the succession model development regarding process issues in succession plans. The process of succession can be interpreted by two aspects: (a) the process models (Handler, 1990; Longenecker & Schoen, 1978) and (b) the lifecycle models (Barnes & Hershon, 1976; Bogdány et al., 2014; Gersick et al., 1997; Greiner, 1998). The process models construe the succession process as a periodic process. The life cycle models interpret the succession process as a way of organizational evolution

finalized with business transfer. Organizations could create and sustain high bench strength by moving beyond succession planning as a process of updating a list. A systematic process based on the integration of leadership development frameworks and succession plans is considered as a way to take a long-term view by designing individual development plans for developing and managing talent throughout the organization (Conger & Fulmer, 2004; Groves, 2007). The main categories related to succession planning are examined herein, and we summarize the different models proposed for the matrix of succession planning in organizations, the succession planning process are presented in Table 3.

Table 3. The Matrix of Succession Planning Process

No.	Authors/Years	The Main Stages in Succession Planning Process															
		Set clear and relevant	Making management	Identify critical positions	Identifying competencies	Selecting /Assessment	Adjustment and transition	Employees' willingness/Interest	Development plan for	Appraising individual	Assessment of the readiness	Mentoring	Boost morale/Motivation	Promotion based on	Information System	Evaluate Process	Monitoring of plans / Continual
1	Redlich (1977) & Greenblatt (1978) stages of succession planning			✓		✓	✓										✓
2	McGivern (1978) process of succession planning	✓											✓				✓
3	Friedman (1986) dimensions of succession planning	✓	✓	✓	✓	✓			✓	✓					✓		
4	Churchill & Hatten (1987) stages of succession planning	✓							✓								✓
5	Kesnar & Sebora's succession planning model (1994)	✓	✓	✓	✓	✓			✓	✓						✓	✓
6	Eastman (1995) practices of succession planning	✓	✓		✓				✓								✓
7	Metz's succession planning model (1998)				✓	✓								✓			✓
8	Bayham's succession planning model (1999)		✓	✓	✓	✓			✓			✓					
9	Payne (1999) steps of succession planning	✓	✓						✓								
10	Conger & Fulmer (2003) Rules of succession planning			✓					✓								✓
11	Burke's (2003) Principal stages of succession planning	✓		✓	✓	✓			✓								
12	Rothwell (2005) pointed star model	✓	✓	✓	✓	✓			✓	✓	✓					✓	

13	Harrison, McKinnon & Terry succession planning model (2006)				✓	✓		✓	✓		✓				✓	✓
14	Gandossy & Verma (2006) cornerstones of succession planning	✓	✓	✓		✓			✓							✓
15	Kim's succession planning model (2006)	✓				✓			✓					✓		
16	Charan's succession planning model (2006)				✓											✓
17	Rubin, Powers & Illia (2007) Basic Steps of succession planning		✓		✓	✓			✓			✓				✓
18	Jarrell & Pewitt (2007)	✓				✓			✓						✓	
19	Grove's succession planning model (2007)					✓			✓			✓				
20	Human Resource Management, SHRM(2009)	✓			✓				✓				✓			
21	Riddick's succession planning model (2009)	✓				✓			✓						✓	

4. Success Metric of Succession Planning

A succession planning success metric is a tool or mechanism for evaluating the implementation of a succession plan. Numerous processes of succession plan efficacy are applied in theory and business practice, depending on the direction, organizational environment, and support systems that exist. Success metric is relatively reflected to the evaluation process of succession planning, in addition to tracking success indicators on a regular basis, identifying candidates' degrees of advancement, and using a variety of evaluation techniques to correctly expose the reality of succession planning progress.

In order to ensure continual progress, the review process at each level in succession planning should be continuous and comprehensive, with a primary focus on evaluation instruments; these are all necessary to accurately expose the reality of succession planning progress (Abdellah, 2021). When it comes to succession planning, organizations can look at multiple factors to assess their outcomes. Succession planning's success depends on many factors such as well-planned design, resource allocation, careful implementation process, credibility of staff, and commitment of top-level management (Huang, 2001). Some organizations look at the number of candidates in their pipelines, while others track retention rates for their succession candidates. Ultimately, there is no one set of metrics that is commonly used. In fact, the studies revealed a concerning lack of measurements metric in succession planning. Hence, this study focuses on three key success metric succession plans based on (Rothwell, 2016), (Fahr UAE, 2017), and (Pandey & Sharma, 2014). The success metric of succession planning is presented in Table 4.

4.1 Bench Strength

The organization's ability to quickly find skilled and well-suited internal talent to immediately fill the crucial positions is referred to as bench strength (Riddick, 2009). Whenever an incumbent leaves a critical position, whether in leadership, management, or operations, the organization should have a successor or plan a succession to avoid affecting operations. Bench strength can be a sign of warning regarding the probability of risk that may occur based on the score or rate of achievement displayed. To ensure a stable and strong bench strength, department heads and management should conduct a talent review or talent pool review to identify individuals who not only have potential, but are also capable and interested and understand the values and have existing beliefs in the organization's principles and core values. Furthermore, the career paths and promotion opportunities for the group of individuals involved are provided, so that the employees are aware of all of the management's planning. It has been stated that it is much better to grow out a leader from a company rather than hire one from outside (Pandey & Sharma, 2014). The difficulty of identifying and preparing such groups of individuals will result in organizations having to look at alternative options by finding suitable external candidates to fill the vacant positions.

4.2 Time-to-Fill

Time-to-fill is a measure of the effectiveness of hiring efforts and the hiring process. If an organization makes a succession plan based on hiring outside workers, reducing the time-to-fill is crucial to the success of the plan. In addition, there are measurement indicators based on the period of filling positions, especially from the group within the organization. This is to strengthen the justification for the effectiveness of the succession plan by targeting the positions held among the internal staff of the organization as opposed to the option of hiring external candidates. Time-to-fill is a very different metric from time-to-hire. Time-to-fill captures the time for the entire hiring process from job requisition to job acceptance, while time-to-hire captures the time the eventual hire enters the talent pipeline to the time they accepted an employment offer (SHRM, 2017). Time-to-fill is the total amount of working days between submission of a job requisition to official hire. If the organization is looking to understand time-to-fill on a team, department, or organizational level, add the sums for each role divided by roles hired

4.3 Talent Turnover

Succession planning and employee retention are mutually reinforcing, meaning ineffective succession planning leads to turnover, and that would, in turn, make the succession plan ineffective (Hassan & Siddiqui, 2020). Retention is an early indicator of employee happiness and wellbeing. The organization can set up a superb succession plan process, but it will not solve the issue of the employees leaving. Hence, succession plan metrics also need to look at the percentage of turnover among talent groups. Individuals who leave the organization for any reason, either directly or indirectly, can affect the amount of individual potential for the next line of leadership. Organizations need to anticipate the turnover rate that will occur based on factors that can be controlled, such as the individual retirement period, or always provide facilities and take care of employee welfare with a clearer environment and career

opportunities. Ali & Mehreen (2019) found that succession planning provides job security and creates positive career attitude, which in turn, mitigates the turnover intentions among employees.

Table 4. Success Metric of Succession Planning

No	Authors	Success Metric Indicator	Description
1	Rothwell (2016)	How long does it take to fill key positions?	Measure the average elapsed days per position vacancy
		Percentage of key positions that are filled from within?	Divide the number of key positions filled from within by the total number of key positions
		Percentage of key positions that can be filled from within?	Divide the number of high-potential workers available by the number of expected key position vacancies annually
2	Pandey & Sharma (2014)	Fulfilment percentage	Percentage of vacancies filled internally
		Ready pool	Percentage of position for which ready and willing successors are identified
		Retention rate of High Potential (HIPO)	Percentage of HIPO retained in the pool
		Performance of recently promoted	Number of rating of excellent / 1 - or exceeds expectations
		Number of High Potential (HIPO) promoted	No. of HIPO identified and given opportunity.
		No successor	Priority positions with limited or no successors
		Positions covered	Percentage of positions covered by succession plan process
3	Federal Authority for Human Resource (FAHR), UAE (2019)	Bench strength	Number of essential resources available in the talent pool _____ Number of key positions in total
		Percentage of critical positions with identified successor	Number of key positions having 'Ready Now' successor _____ Number of key positions available in total
		Talent (HIPO) turnover percentage rate	Number of essential resources that have departed the organization _____ Number of resources available in the talent pool
		Percentage utilization of talent pool	Number of essential resources promoted, elevated, or transferred _____ Number of essential resources in the talent pool

5. Alignment Success Metric of Succession Planning

The alignment process also includes an evaluation component that must be defined in a clear and consistent manner using a success metric method. Evaluation refers to the level of outcome that will place the success of a process or system according to the standard criteria.

The success metric is a mechanism to assess the success level of a process, especially in the succession plan. It links the Key Performance Indicator (KPI) of the succession plan with the organization's KPI. Several authors have suggested that succession planning cannot effectively operate in isolation; it has to be integrated into the overall organizational strategy and become part of the culture (Al Suwaidi et al., 2020; Atwood, 2007; Kouzes & Posner, 2017). indicators.

6. Discussion

The effective succession planning needs to be a planned and structured process in order to create a strong pipeline of high-potential talent for the next generation of business leaders (Rothwell, 2016; Atwood, 2007; Calareso, 2013). It is all about getting the basics right, keeping to a high-quality process once it has been established, and building in accountability for closing gaps in the pipeline of potential talent in succession. The success metric is a critical component of evaluation since it serves as a performance indicator for determining how effective succession planning is. The success metric will determine how the succession planning achieves the objective of organization. This study focuses on three key success metrics of succession planning: (1) bench strength, (2) time-to-fill, and (3) talent turnover. Succession planning is seen as a critical approach for managing people and focused on establishing a pool of future leaders in order to secure the organization's ultimate goal. However, in order to respond to demanding and rapidly changing business environment, the concept of succession planning must agile and evolve accordingly. The organization needs to focused on creating succession planning programs that align with their business strategy and changing business needs through the measurement of success metric indicator.

7. Conclusion

In conclusion, the three scopes that have been discussed are evolution of succession planning, systematic process, and success metric of succession planning. The scopes discussed are closely related to the effectiveness of succession planning. When these three scopes are combined, succession planning carries a broader meaning in which it is a systematic process toward the preparation of future leaders and individual career development. Systematic succession planning process are indeed given attention in developing individual to be ready leaders for key positions at organization. A rigorous development plan must be implemented through a systematic approach to ensure that the organization's top talents are given relevant exposure and opportunities for growth in order to fully realized their leadership potential.

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