

What Is Your Succession Plan?

Written by: Dr. Nanette Miner, Leadership Development and Workplace-Learning Strategy Consultant, The Training Doctor

The majority of architecture, engineering, construction (AEC) firms are run by their original founder or founders. Most have not thought about a succession plan, also known as a transfer of leadership. It's a nagging fear in the stomach of many that their firms will either have to be sold or merge, or will simply cease to exist if they don't "do something" soon – but how, exactly, does one go about identifying the future leaders of their organization?

Here is an exercise that can be done in a matter of hours that will at least give you a starting point. It is one of the first activities that we do with clients, during a two day "strategy sprint" in which we help them to identify their future leaders and their development needs – so that when they are promoted from within, they are capable of taking over the reins and successfully shepherding the organization into the future.

The outcome of this exercise is to determine who is in your leadership pipeline (or not).

HERE ARE THE INSTRUCTIONS:

- » Gather all of your senior leaders in a room.
- » Seat them around a conference table.
- » Give each one an index card.
- » Have them each write down the top three individuals on their team who they think could be their successor if or when they leave their role.



- » Once everyone has written their top three, they pass their card to the person on their right.
- » The person on their right then puts a checkmark next to the ONE they believe would be a good successor (it doesn't mean they have all the skills now, but someone who, down the road with the right development, could move into the senior leader's position.
- » Each card continues to get passed to the right until it makes its way back to the original "owner" of the card.

Each card should have a "clear favorite" based on the number of check marks next to their name; but remember, all three were considered viable candidates.

Whether or not you have identified a likely successor through

the activity, there are a number of additional “checkpoints,” if you will, of a thriving organization:

First, was each current leader able to name three likely successors? If not, you know your organization lacks a culture of nurturing talent from within, and that is a problem you’ll want to address immediately. You may be able to do that by creating professional development plans for younger staff members or you may need to hire someone with the requisite skills if your need for succession is immediate (say, in the next three years).

Second, as the cards got passed around, did you hear your current leaders exclaim “I have no idea who any of these people are,” about the names they saw on the cards passed to them? If yes, you know you have an organization full of silos. While it’s not probable to know everyone in an organization (especially, say, in organizations of over 400 employees), your current leaders should be aware of high performers in other departments. And the reason they should be aware of them is because their current leaders are sponsoring them, giving them experiences outside their specialty area, and exposing them to the leadership of the organization. You can’t promote someone to a leadership role out of the blue, they must be nurtured and exposed to many aspects of the organization. And on that note...

Just because you identified a likely successor through this exercise, don’t presume they want the promotion. A lot of younger employees don’t aspire to leadership roles because they identify them with stress and poor work-life balance. Be sure to check with the likely successor and if they demur, you can move to the second or third person on the list, or again, start to look for someone from outside the organization – bring them in now so they start to acclimate to your culture, vision, and goals, long before they move into a senior leadership position.

Thanks to the “great resignation” and a general reassessment of work-life values, many organizations are finding themselves in need of promoting the “next generation” of leaders. But needing to be able to and ready to be able to are two very different things. It is imperative that your organization has a succession plan in place, and this activity will get you started on the right foot. 🐦



About the Author

Dr. Nanette Miner is a leadership development and workplace-learning strategy consultant. Through her firm, [The Training Doctor](#), she has revolutionized the way that individuals are prepared for leadership roles in their organizations. Rather than a chosen few, her process is aimed at ensuring everyone in the company has the skills and business acumen of a leader. This approach ensures both immediate and long-term return-on-investment (ROI) for an organization.

She has written articles for *Chief Learning Office magazine*, *Forbes*, and *MBA World* and is a frequent guest on workplace training and career podcasts and talk radio such as *Inc. Radio* and *America's Workforce Radio*.

Nanette regularly speaks at industry conferences and corporate learning events on how to integrate leadership capabilities throughout an organization. An author of eight books, her most recent is *Future-Proofing Your Organization*.

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