

Succession Planning:

Building a fair and strategic process

CONTEXT

This succession planning initiative was developed for a large, multimillion-dollar retail headquarters with a sizable and complex workforce. The organization was facing challenges in tracking leadership readiness and identifying growth potential across departments in a fair, consistent way. The tools and methods created through this work have since been adapted and used in several other organizations across sectors.

THE TASK AT HAND

Within the company's largest department, there was no clear pathway for advancement, no shared understanding of what leadership potential looked like, and limited transparency in performance evaluation. Promotions often happened by default rather than through strategic development.

- Additionally, workforce reductions felt subjective and inconsistent.
- The risks of inaction were clear:
- Promoting people to their failure point
- Losing high-potential staff due to a lack of visible opportunity

Keeping underperforming individuals in roles misaligned with their skills

APPROACH

Working in collaboration with department leadership, a balanced and measurable system was developed to assess both individual performance and leadership potential. The focus was on fairness, clarity, and consistency.

- Custom Metrics Framework: Defined what "good" looks like for all roles and what expectations were consistent across the board
- Skill + Result Balance: The approach measured both outcomes and soft skills, reinforcing a holistic view of employee value
- Change Management: While leadership quickly agreed there was a need, it took more effort to build buy-in around the method. By grounding decisions in shared metrics and reducing reliance on personal bias, the approach gained credibility and trust



Emerging
Businesses

Mergers/
Acquisitions



Business
Sustainability

Speaking/
Training



Disability
Advocacy



"Some of the most clear and informative reporting I have seen" Client VP

"You ask the questions I did not know needed answering." Client

TOOLS AND PROCESSES

Custom Templates and Charts

Built a robust, interconnected system of spreadsheets to rank employees across multiple perspectives and compare performance within similar roles

Integrated Systems

The process informed performance reviews, talent planning, and when necessary, guided layoff decisions with clear documentation and rationale

Leadership Visibility

Created visual tools to identify emerging leaders, track readiness for promotion, and highlight development opportunities

RESULTS

Shared, Transparent Processes

A written process was adopted, and all leaders were trained in how to use it

Improved Transitions

Most key roles had a clear internal successor or pipeline. Many vacancies were filled internally, often starting at entry level

Clarity in Growth Pathways

The system made it easier to spot who was ready to move up, who needed development, and who could serve as a backup for key roles

Cultural Shift

Initial hesitation gave way to broader acceptance, as staff saw how a balanced approach could fairly recognize different strengths — not just loud voices or high output

Stronger Resilience in Tough Times

When layoffs occurred, the process helped ground decisions in logic, not emotion, and ensured the organization could explain and defend its actions confidently

CONCLUSION

What began as a leadership visibility project became a foundation for long-term talent sustainability. The process balanced human potential with business needs, creating a more transparent and objective way to recognize, develop, and retain talent. Its success has inspired similar efforts in multiple organizations since.