Seven building blocks of a succession planning toolkit

welcome to brighter

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Introduction

The ongoing pandemic has disrupted revenue streams, and corporations are scrambling to transition to the new 'normal,' making crucial decisions to tide over the crisis. No risk managers or business gurus had envisaged such an abrupt and ongoing disruption. Industry stakeholders, across the board, have no experience in dealing with a disorder of this magnitude. However, it doesn't justify the profound sense of unease among the employees, shareholders and customers, all of whom are vying for support to realign and re-strengthen their organizations.

What can a company do or could have done to survive this crisis? Succession planning is the answer.

Every company must consider it or would have to confront the issue in the future. Businesses are facing increasing vulnerability with each passing day. Survival instincts are kicking-in as companies are facing existential crises in the absence of viable leaders. We don't profess that leaders can predict crises and avert them. However, choosing the right successors does make all the difference. Identifying potential leadership is the key to business continuity.

Businesses are expected to remain relevant by adapting, innovating and accelerating toward the digital ecosystem. They need to prepare and prioritize their vision, identify vulnerabilities, shortlist pipeline potentials and envisage a path forward. These can't be undertaken without a leader or a plan. Succession planning assumes significance in such situations.

One of the many benefits of succession planning is navigating the way-forward by syncing your vision with a suitable leader. By providing in-depth knowledge of critical, work-relevant personality traits and behavioral tendencies of individuals, succession planning tools map the right candidates to an organization's requirements and derive results.

It is then the candidates' leadership qualities, knowledge, future-thinking approach actions that transform challenges into opportunities and advantages.

It is well-established that the disruption has created much uncertainty in the business environment, likely to sustain for a few years. This underlines the need to re-evaluate dormant succession plans and ensure a talented and ready pipeline of leaders to withstand current and future challenges. Companies can undertake them by identifying ideal succession planning tools.

The succession planning toolkit

Even the most successful individuals have flaws that are often blind-sided. Hence, a combination of personality, behavior and cognitive tools provides an in-depth measurement of crucial, work-relevant personality traits and behavioral tendencies for individuals positioned in specific high-priority roles. These tools are the building blocks of any assessment.

Succession planning tools help identify an organization's potential succession gaps and enable planning the future staffing needs. Understanding, discovering and measuring values, attainment and persistence allow for making informed decisions.

Here is an array of accurate and informative succession planning tools to help you manage your future needs:

1. Personality tools

In succession planning, it is vital to gain a more comprehensive understanding of personality, of which the management may not be aware. Therefore, companies assess personality traits that are the determining characteristics exhibited consistently despite changing circumstances. An ideal personality tool is validated and optimized to test beyond the traditional 'Big Five' framework of personality. It provides a comprehensive picture of the culture and role-fitment while evaluating the likelihood of handling integral work-related activities. It also proffers objective insights into how other people might react to the same situation. Such in-depth detail increases the possibility of making the right decisions in applied settings.

Many state-of-the-art personality tools also measure motivation. Motivation is synonymous with related personality traits such as commitment, accomplishment and enthusiasm.

Personality assessment is often undertaken at the mid and senior levels. Mercer | Mettl's 'Mettl Personality Map (MPM)' measures personality via a unique and innovative 28 facet and a 4-factor structure of personality beyond its traditional framework. It reveals hidden aspects of the candidates' personality, such as whether they possess the right personality traits related to performance and compatibility in given roles or positions.

2. Behavioral assessment

A behavioral assessment tool requires candidates to demonstrate chosen behavioral competencies in one or multiple exercises that mirror actual workplace situations. It identifies and analyzes behaviors required of employees when they take the lead, professionally and socially. A behavioral tool brings clarity to how people behave at work. Hence, they combine innovation and scientific rigor to assess the role-fitment. Different types of behavioral assessments can be used independently, or in combination, for an individual's holistic overview. It includes caselets, situational judgment tests, inbox exercises to gauge an employee's mindset and potential.

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3. Cognitive assessment

Cognitive ability is the brain's ability to undertake core tasks such as thinking, learning, memorizing, paying attention, visualizing, recognizing, organizing and interpreting the surroundings (perception).

In succession planning, cognitive tests assess critical thinking and reasoning logic related to on-the-job performance. The test measures two intelligent types- crystallized intelligence and fluid intelligence -through complex questions.

Crystallized intelligence
Requires one to use prior knowledge and experience to solve problems
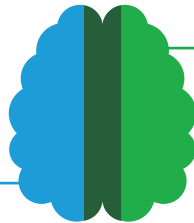
Fluid intelligence
Requires one to apply oneself in the present situation without using any prior knowledge

When succession planning for top management, cognitive tests help measure the aptitude required by leaders to achieve excellence, aligned with business goals. Various research studies have indicated that cognitive ability predicts job performance twice better than job interviews, thrice than work experience, and four times the education level!

4. Technical assessment

For companies assessing technical roles, a technical competency framework handbook provides a detailed insight into identifying stellar IT/ non-IT skills sets. Various professional tests provide comprehensive knowledge into on-job-relevant behavior and the technical expertise required to be successful.

5. 360-degree feedback

It is advised to gather the stakeholders' perspectives, with whom the potential successor works and interacts regularly. Seeking multiple stakeholders' feedback enables them to understand others' perceptions of their readiness to take on future roles. Leveraging this information can help the employee develop an improved perspective on performance, skill levels and behavior as perceived by others. Using a multi-rater feedback mechanism, such as Mercer | Mettl's 360-Degree Feedback Survey, allows one to understand whether the concerned employee has demonstrated leadership qualities. Using this tool as an additional metric to determine the right fit ensures that multiple perspectives are factored when taking the final decision.

An employee's superiors, peers, direct reports and even clients can cumulatively evaluate the concerned employee's performance. The 360-Degree Feedback Survey is easy to understand, offers intuitive insights, highlights an employee's behavioral dynamics observed on-the-job and suggests developmental steps. Competencies, survey statements and reports are all customizable.

These time-tested succession planning assessments can come together as comprehensive assessment batteries or full-fledged Assessment/Development Centers (ADC).

6. ADCS: Assessment and Development Centers

Assessment and development centers (ADCs) are scalable, cost-efficient and tailor-made tools that help identify successors across various jobs and levels. ADCs bring together roleplays, situational judgment tests, group discussions, presentations, interviews, simulations, psychometric and aptitude tests, and similar activities to make crucial people decisions. Multiple assessments provide a detailed evaluation of candidates to determine their most appropriate roles. ADCs undertake a comprehensive analysis through a blend of online and assessor-based tools. They decipher the target audience's standing on relevant roles/level specific competencies.

The ADC toolkit consists of virtual and blended ADC:

- **Virtual Assessment and Development Centers**

    Virtual Assessment Development Center involves employing multiple online tools to evaluate the extent to which chosen participants display selected competencies. It is a detailed evaluation of individuals' role fitment by assessing each person's various aspects to succeed in the required role. With zero logistical hassles, no bias and simple infrastructure requirements in internet connectivity and computers, decision-makers gain a holistic understanding of the candidates through multiple lenses.

    The Virtual ADC toolkit mostly consists of:

Personality tools
Represents work-relevant personality traits using:

Extraversion- a tendency to seek the company of others and talk

Openness to experience- the degree of intellectual curiosity, creativity and a preference for novelty

Emotional stability- a predisposition to psychological stress

Agreeableness- a measure of one's trusting and helpful nature

Conscientiousness- the tendency to be organized and dependable

Cognitive ability tools
Represents work-relevant cognitive ability traits using:

Abstract reasoning- measures lateral thinking skills

Critical reasoning- measures creative thinking abilities

Logical reasoning- measure reasoning and logical thinking skills

Numerical reasoning- measures the ability to deal with numbers

General mental ability- it is a combination of logical, numerical and verbal reasoning

Verbal reasoning- understand and logically work through concepts and problems expressed in words

Attention to detail- measures the ability to sustain focus while avoiding distractions

Data interpretation- measures the ability to analyze data to infer information

Behavioral tools
Represents work-relevant behavioral traits using:

Situational judgment test- to capture a candidate's reaction to workplace scenarios

Caselets- small business cases used to test aptitude and reasoning

Business case simulators- it simulates a case study environment to test candidates' approaches to business problems

Inbox prioritization (in-tray exercises) - to measure the ability to delegate and prioritize

- **Blended aAssessment and Development Centers**

  Blended Assessment & Development Centers are a combination of onsite and online assessments. The assessors gain insightful and data-backed outcomes by expanding the means and methods of measuring a potential candidate. This interwoven scenario improves the variety of assessments available and also provides different perspectives on each outcome. Few competencies are mapped using online tools with life-like simulations while the rest are assessed basis physical activities.
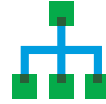
  In addition to the online tools mentioned-above, the Blended ACDC toolkit consists of:

Group discussion & group activities	Case study presentation	One-to-one roleplay	Competency-based interview

Group discussion and group activities

Conducted among a select few candidates tasked to work together with all the group members to solve a given problem. Through such group activities, candidates are assessed on social skills, leadership propensity, influence, inclusivity and other values. It is undertaken with assessors as observers who evaluate the candidates on the concerning competencies. Candidates are assessed on active participation, along with their quality of ideas and perspectives.

Case study presentation

A hypothetical business-related case study is presented to the participants. This activity takes them out of their regular day-to-day roles. It offers them a glimpse of the problems while allowing them to experience critical interdependencies, execute best practices and explore alternatives to devise an all-embracing strategy.

One-to-one roleplay

This activity enables examining how the participant behaves with others in a given situation. This exercise allows the assessors to observe how the participant responds when dealing with challenging interpersonal conditions. The individual's ability to perform well in this activity is likely to directly correlate with the role's required competencies and behavior.

Competency-based interview

The premise of this interview is that past behavior is the best predictor of future performance. Hence, a Competency-Based Interview uncovers the participants' past performance through questions. It highlights their ability to perform the job.

Each of these tools can be administered online and/or in-person, factoring in many demands of the present-day business environment. These tools are customizable for all levels of employees throughout their employee life-cycle, from frontline employees to managers and other senior positions.

Mercer | Mettl also offers a more homogeneous offering based on a standardized framework used across industries and/or seniority levels.

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7. Pre-built tests

A readymade set of assessments is mapped to predefined competencies. It is not specific to any organization but caters to a standard framework typically used across industries and/or seniority levels. Ranging from elementary tests to tests that are highly specific to job roles, the pre-build tests will enable you to select the best candidates relevant to a particular role/function.

Handpicking the right candidates for succession is no longer a task. Easy-to-read, advanced reporting insights, delivered at scale offer companies a comprehensive understanding of what to expect. Concurrently, a detailed combination of individual competency-wise assessment reports with optional individual development plans can also be shared with the participants. It provides them with an analysis of their strengths, areas for development and readiness for future roles (for non-selected participants, it also provides recommendations on their readiness). The highly sophisticated reports also include the organization's benchmarked strengths.

Mercer | Mettl is the largest and fastest-growing assessment and skill measurement company in India.

It offers sophisticated data-backed tools to help companies identify an ideal successor. Whether it is an offering of multiple evidence-based assessments or extending tailor-made development centers to evaluate talent readiness and pipeline potential-Mercer | Mettl has a perfect combination of data science and psychometrics that solve significant succession planning-related problems.

It is robust, reliable, and secure. A portfolio of 100K assessments per day highlights scale, 20+ languages showcase the diversity, and prompt service to 90+ countries underline the trust reposted in our brand. The company offers deep analytical rigor and specialized expertise. An in-house team of industrial-organizational behavior psychologists and data scientists works to validate and develop every assessment, analytics, and insights.

100K
assessments

20+
languages

90+
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The USPs of Mercer | Mettl's toolkit

The Mercer | Mettl team recently helped India's largest engineering and construction conglomerate to initiate its succession plan.

Problem

The firm wanted an objective method to identify their high-potential candidates to train them for assuming leadership roles in the future.

Solution

The subject matter experts at Mercer | Mettl formulated a solution by creating a Custom Behavioral assessment and Emotional Quotient report for screening high-potentials. They covered various critical parameters such as people management, ambition, tactics and learnability. The assessment instantaneously provided detailed insights into the candidates' strengths and weaknesses, enabling the firm to gain a holistic understanding of its talent pool.

Impact

The firm could roll-out a fast and accurate hi-potential identification program. It also contributed toward engagement and rewards to ensure that deserving people were invested in and continued with the company.

Here's what makes Mercer | Mettl's tools world-class:

Scale

Mercer| Mettl's assessment platform is designed to maintain the sanctity of high-stakes assessments. Thus far, the company has conducted more than 20 million online tests, and the numbers continue to grow. Its robust technology has a proven track record of delivering results at all levels. It includes the company's recently conducted over 100,000 proctored assessments in one day.

Security

Data breach, security hazards, and privacy risk are global concerns. Such issues prompt a sharper focus on regulations such as Europe's General Data Protection Regulation (GDPR) and ISO Certification to strengthen data privacy. Mercer | Mettl follows a stringent security protocol to safeguard both candidates' and clients' data. The data is hosted on Amazon Web Services (AWS), a highly secure cloud platform for storage and computation. It uses HTTPS (256-bit SSL encryption) for secure data transmission. Webcam proctored tests can also be taken on clients' systems without the need for software download. Mercer| Mettl's management provides the safety and encryption of all available data.

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Credibility

Mercer | Mettl's futuristic anti-cheating features ensure credibility, integrity and eliminate the risk of cheating by candidates. **An AI-algorithm trained with more than 2.8 million proctored assessments detect up to 18 dynamic digressions with over 95% accuracy.** Mettl Secure Browser (MSB), a secure browsing feature, allows hosting online assessments in a safe environment, without concerns about on-screen cheating. A 3-point candidate authentication feature ensures the utmost reliability and authenticity of a candidate. Proctors available around the clock verify the photo ID against registration details and attest to the candidate's legitimacy.

Custom assessment battery & ADCS

If you're looking to build a new test according to your requirements, Mercer | Mettl's subject matter experts also help create a customized version. A comprehensive group of assessments is mapped to either the organization's competency framework or a specific role. Organizations can even get customized reports for the candidates taking the assessment — for example, highlighting an essential competency in the result.

Technology

Whether it is flagging social desirability or stating a candidate's reliability, Mercer | Mettl uses an eclectic combination of data science and technology to enable evidence-based reports that allow making better business decisions. Instant and fully accessible reports provide granular insights into various components, such as the number of attempts, difficulty-level analysis, question-wise summary and areas of developments. Available via individual and group scores, the data-backed report ensures recommendationS to the management concerning the candidates' efficiency for each role.

Conclusion

Leadership succession must be well-analyzed, free from complexity and focussed toward the future.

Succession planning tools spot the next generation of leaders, understand their capacity for growth and enable them to be offered the experience and support needed to develop and succeed. They give you a competitive advantage. Can you imagine Amazon without a Jeff Bezos? Maybe not.

A strong focus on talent and choice of leaders in an organization is arguably the most significant factor. Succession planning tools give us a tremendous leverageable opportunity. We must place succession planning as a core mission in our corporate playbooks.
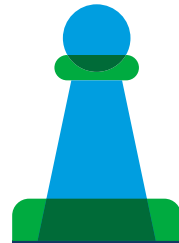
About Us

At Mercer I Mettl, our mission is to enable organizations to make better people decisions by making credible people decisions across two key areas: Acquisition and Development. Since our inception in 2010, we have partnered with 2900+ corporates, 31 sector skill councils/ government departments, and 15+ educational institutions across 90+ countries.

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