

Intentional Pathway Planning Moving Past Succession Planning in Era Post-COVID

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Abstract

Prior to and during the COVID pandemic, succession planning has been an effective method for training leaders to replace leaving or retiring leaders in an organization. However, research has shown that gaps in the succession planning process meant that employers have not been able to meet their needs in the post-COVID era. Employers replace a leader by finding an individual who fits the position's requirements and grooming that employee to fit the role. Replacing these leaders plays an essential role in aiding the company to maintain its competitive advantage in all industries in both the private and public sectors. Training leaders require employers to adapt and create new training plans to remain competitive and retain employees in today's industries. This research will show how intentional pathway planning is a better fit for businesses of all sizes as it provides the company with a holistic view to find a better match for the company. This article focuses on the following proposed areas: 1) succession planning's shortcomings; 2) intentional pathway planning; 3) the need for intentional pathway planning for small, midsize, and large and growing industries; and 4) ways to implement intentional pathway planning.

Keywords

Intentional Pathway Planning, Succession Planning, Post-Covid, Shortcomings, Training

1. Introduction

This article discusses a valuable alternative to succession planning—namely, intentional pathway planning—for the post-COVID era. The article explores implications and makes recommendations for organizations to help introduce how intentional pathway planning may be a good fit for finding the right leader. This

article is not meant to offer an actual plan or guide in implementing intentional pathway planning. The authors' statements, opinions, advice, and recommendations are provided based on supported academic documentation to contribute to the body of knowledge based on improving and adapting to a new training method.

Prior to 2020, companies utilized succession planning to train Millennials to replace retiring Baby Boomers (Johnson et al., 2018). During the pandemic, many companies relied on succession planning to replace leaders due to the increased number of leaders retiring or not wanting to return to work. Prior to and during COVID, employers that utilized succession planning had a greater chance of retaining dynamic individuals, saw a reduction in the cost of recruiting, and retained employees (Johnson et al., 2018). However, toward the beginning of 2022, employers were finding that succession planning did not fit their needs as it did in the past. Training had changed, and employers needed to adapt to the changes by implementing intentional pathway planning.

The objective of this research is two-fold. First, it investigates how COVID has impacted the training of upcoming leaders within organizations. Second, it outlines a method for intentional pathway planning using best practices in organizations of varying sizes.

Methodology

The researchers explored new territory to gain deeper insights into a more effective method for replacing the vacant leadership positions. This research was designed to determine how intentional pathway planning may be more effective than succession planning in the post-COVID era. The methodology approach applied is an informal qualitative design with an exploratory approach (Creswell, & Creswell, 2018). The data sources used in this study include scholarly articles, and online surveys from scholarly websites and documents.

2. Literature Review

2.1. Succession Planning's Shortcomings

Succession planning is often utilized to replace employees who leave or retire from a company. Unfortunately, in many companies, leaders start thinking about filling key positions only after an employee has retired or left. The saying "better late than never" may have led companies to make poor decisions about the people they hire to fill empty positions. Some companies have effectively filled leadership roles using succession planning, which helped business leaders and human resource experts think several steps ahead. Unfortunately, as of August 2021, of the "580 members of the Society for Human Resource Management who were actively working as [human resource] professionals, 56 percent said their organization didn't have a succession plan in place" (Tyler, 2022).

Based on a Society for Human Resource Management poll in 2016, when organizations have a succession plan in place, fewer than half of them consider

middle management and significantly fewer have any considerations for individuals (see **Figure 1**). The research in **Figure 1** below showcases the number of leadership positions replaced by Succession Planning in 2016. In this study you can see that 79% of the leaders replaced were at the executive level while only 47% of middle management was considered for succession planning.

As the results show, succession planning fails to take a holistic view of what employees and roles are needed in an ever-changing organization. The old-school viewpoint of, “while all employees are important, not all jobs are key” (Tyler, 2022) no longer serves the best interest of the company.

A survey conducted in May 2022 by Harris Poll on the importance of succession planning found that succession planning’s effectiveness had decreased during and following the COVID pandemic (The Harris Poll, 2021). The results indicated that 47% of survey participants had been required to take on additional responsibilities when another employee left; such additional responsibilities caused retention challenges and made finding new employees difficult. To prepare the company for the future, companies need to develop a few talented employees who can take over responsibilities and roles (The Harris Poll, 2021).

However, focusing on the development of one individual as the successor carries its own risks. As Shane Stafford stated, “The person one is developing as a successor may leave if the opportunities don’t develop fast enough; if people are good enough to develop, they may get recruited.” If a company has taken the time to groom the employee, it loses a wealth of knowledge and needs to start from scratch when the employee leaves for other opportunities (Stafford, 2020). Thus, succession planning’s shortcomings can be costly in terms of both time and money. Intentional pathway planning can assist a company in being well prepared when leaders exit (The Harris Poll, 2021).



Figure 1. Succession planning by position (Meinert, 2021).

2.2. Intentional Pathway Planning

In response to the COVID pandemic, some employers are replacing succession planning with intentional pathway planning. Companies are seeing a greater need to look past the person leaving the company and adopt a holistic approach, which intentional pathway planning provides (Ink+Volt, 2020).

Intentional pathway planning requires the company to look at the big picture, not just the present moment. The company begins by making plans for weeks, months, and even years, if possible; it writes down the most important goals and implements the big picture into its goals (Morrow). The keys are shown in **Figure 2**.

Intentional pathway planning ensures stability, sustainability, and continuity when high level leaders leave as the organization and develop talent from within. To accomplish the key items shown in **Figure 2**, employers need to develop a plan to cover all leadership positions, prepare the current employees for high level positions, provide training and mentoring, be aware of the gaps that need to be addressed, provide growth and leadership opportunities, and consider the goals of the company (Forbes, 2020b).

Planning for leadership changes goes beyond just a single role or person. Rather than developing a succession plan exclusively for an executive director role, a company should take a mindful, bigger-picture approach that prepares for leadership changes in all key roles, including the board (Forbes, 2020b).

2.3. Post-COVID

In the post-COVID world, many companies experiencing the “great resignation” are focusing on the replacement of top leaders without analyzing equally important positions throughout the company. Instead of following the traditional succession planning approach, the newer holistic intentional pathway planning approach can be more effective. This approach can produce effective leadership (Forbes, 2020a) and is more likely to align with overall business goals.



Figure 2. Keys to intentional pathway planning (Forbes, 2020b).

An organization is more likely to be effective when utilizing intentional pathway planning as it creates stability and sustainability and develops talent within the organization (Forbes, 2020b). Simply identifying a successor is no longer useful (Forbes, 2020a) as many employees are leaving for better opportunities. By building up employees and promoting growth from within, an organization is more likely to see positive results, including improved employee morale, culture, retention, and engagement (Forbes, 2020a). For an organization to continue to reach its goals, it must adapt to the ever-changing environment in this post-COVID world.

2.4. Apple Case Study

The departure of Steve Jobs from Apple in 1985 is a prime example of an ineffective way to use Succession Planning and why intentional Pathway Planning is a better fit for most companies. One problem many companies have in using Succession Planning is they fail to find a replacement that meets the employee's needs. Apple is a good example of failing to find a replacement that met the needs of the company.

A company is defined by its CEO and when they leave their vision also leaves the company and the replacement may lack a vision for the future. This occurred with Apple. After Steve Jobs left due to an illness, multiple leaders were brought in. They all lacked the visionary leadership and innovation that Jobs had. Due to the lack of a clear plan, their Succession Planning failed. Apple faced a declining market share and was struggling financially. Once Jobs returned in 1997, he helped make a remarkable turnaround. When leaving the position for good, Jobs found a replacement in Tim Cook. This replacement took time and a mentoring program (Hardwick, 2023).

The succession plan seemed to fit all the check marks for creating a plan. First, Jobs gave a two-year resignation after making his illness public. Jobs introduced Tim Cook during this time. Tim Cook was well-known and liked by the stakeholders, Cook had many years of experience as a COO and knew the company (Goldsmith, 2009).

However, for many companies when they use succession planning it is not that easy. There may be a few things missing. When Cook went to replace Jobs it was not an easy transition. He had no prior experience as the CEO. Cook did not have the same vision for the future of the company as Jobs did. It took time for Cook to fill the shoes and gain the buy in (Peterson, 2020).

Succession planning will only create a plan or process to follow. This is something that can be duplicated. Just because we can duplicate a plan does not mean it will work every time. Companies are not a one size fits all. In Apple's case the original succession plan that could be duplicated faced a couple challenges.

One of those challenges was not every COO makes a great CEO. If they lack vision, it will be difficult for the team to move forward (Goldsmith, 2009).

Second, even if the new leader has the soft skills for financing, and leadership

abilities this does not mean they will effectively work in the new role. Soft skills do not always assist a CEO in the new position. Many times, in today's industry, companies are looking for leaders with a vision and clear plan (Goldsmith, 2009).

3. The Implementation of Intentional Pathway Planning

Historically, succession planning mandated that the organization plans for a replacement of the CEO. As organizations continue to grow, focusing on just one key leadership position no longer captures all the needed organizational knowledge to provide a seamless transition. Horizontal career moves are becoming commonplace to build a broader knowledge base while increasing employee engagement, motivation, and satisfaction (Young, 2022). According to Ryan Jenkins, "75% of Generation Z would be interested in a situation in which they could have multiple roles within one place of employment." This situation makes it increasingly important to plan for the replacement of numerous key positions.

3.1. Implementing Intentional Pathway to Various Companies

The utilization of intentional pathway planning offers the bonus of capturing all the needs of the organization and planning for new roles as they are needed rather than simply replacing roles that have always existed. This approach creates a more streamlined and flexible organizational structure, leading to more competitive advantages.

In Midsize companies one of the benefits of using intentional pathway planning is that it can save costs and improve performance (Forbes, 2022). Midsize companies may be ideal candidates for intentional pathway planning as they need quick results to increase efficiencies and achieve big transformations (Sher, 2021). Adopting a holistic view provides a better roadmap for the future leaders of the company (Sher, 2021).

Midsize companies need to attract leadership talent and may be looking for reskilled or upskilling employees (Pollack & Perreault, 2021). Recruiting someone who demonstrates past successes or skills is not going to give the company flawless results. The company should have a clear job description and a person who is aligned with the values, strategies, and competencies needed to fit the position (Morelli, 2023).

It is possible for a smaller company to utilize succession planning: a smaller company is more likely to find success with intentional pathway planning. As smaller companies usually have fewer than 500 employees, it is much easier to effectively implement this holistic approach. When dealing with a smaller number of employees, it is easier to identify all necessary roles that will potentially need to be filled. Approximately 52% of small companies do not have a plan in place (Lotich, 2022), which can prove especially troublesome. Yet the smaller number of employees makes it easier to engage employees and provide growth

and leadership opportunities. However, small companies may find it harder to consistently promote from within as the necessary skill sets may not be in place. By effectively training and building employees, a smaller company is more likely to be successful when implementing intentional pathway planning.

3.2. Implementing Intentional Pathway Planning

The following process can be utilized to implement intentional pathway planning no matter the size of the company:

Get upper management and human resources on board with the future challenges.

Identify the key roles that are business critical and find the potential candidates for future leadership positions through in-depths interviews and 360-degree feedback (Kahar, 2016).

Create a program to promote self-awareness, identify development needs, and empower leaders to take ownership of their development (Sutton, 2023).

First, use the information collected to collaborate with the CEO and human resources. Second, communicate and identify the gaps in management. Third, utilize resources that would be effective to target those gaps.

Develop a plan to inform the design and leadership development programs (Gavin, 2019).

4. Recommendations and Conclusion

The research has shown to be successful in the implementation of an intentional pathway, companies should consider adapting to the changing times (Forbes, 2020a). Begin by looking at the needs of the organization and visiting the organization's missions. Ask questions that will help you decide if that replacement fits the goals and mission of the organization. Start by thinking about the big picture by looking toward organizational and leadership objectives and desired outcomes.

Be proactive with planning and training to keep a full pipeline of talent and potential leaders. It is important to understand the needs of the employees to better align them with potential lateral or promotional positions.

Look internally first; when possible, promote from within. Grow leaders by prioritizing staff development. Customize the plan to prepare for departures across all levels of the organization. Look at the organization holistically and identify the biggest challenges. Ensure that transition plans are clear and provide concise communication.

Conduct due diligence to acquire the knowledge on when to look externally to fill knowledge and skill gaps. Use consistent systems when identifying potential knowledge and skill gaps. Provide training and development to all employees interested in learning these skills. Prepare for the unexpected by cross training employees.

Above all communicate with the employees to keep them informed. This may



Figure 3. Keys for successful implementation of intentional pathway planning (Forbes, 2020a).

help retain the employees and improve retention. This may alleviate some of the stress while the company is preparing replacements for the vacancies. See **Figure 3** to see how Intentional Pathway Planning can impact organizations.

5. Future Research Directions

Companies of all sizes can benefit from adopting intentional pathway planning, which adopts a holistic approach to succession planning. A holistic approach provides competitive advantages through the retention of key institutional knowledge and improved employee motivation, satisfaction, and retention and cost savings.

Currently, no case studies on intentional pathway planning are available, but there are clear benefits for organizations of all sizes with all forms of organizational structures. This study has certain limitations. It does not include an extensive study of diverse methods used with intentional pathway planning. Future research should apply action research to provide further knowledge through application. In addition, a quantitative study should be performed to assess how intentional pathway planning is faring and what changes occur with employees after implementing the training.

Conflicts of Interest

The authors declare no conflicts of interest regarding the publication of this paper.

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