

Succession management and the strategic development of human resources:

An analysis of a succession management program

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As the baby boomer generation begins to leave the workforce in significant numbers many businesses are facing the prospect of a sizeable proportion of senior management departures in the next three to five years (Bernthal, Rioux, & Wellins, 1999; Guilford, 2000). Substantial senior level retirements and turnover due to high demand for qualified and effective management employees have resulted in organisations indicating significant concerns about the replacement of executive level staff (Dobbs, 2001; Linkage, 1999; Rothwell, 2000). Recruiting and retaining high potential talent is not just a turnover issue but is also related to organisational satisfaction with current staff. An international study of 260 organisations revealed that, 'If given the chance, organisations would re evaluate and rehire an average of only 62% of their leaders and managers . . . In the next two years, 52% of these organisations plan major changes to their succession management process' (Rioux & Bernthal, 1999:1).

Coupled with the departure of one generation of managers is uncertainty about the next. *HR Magazine* (1999) has estimated that the number of 35 to 45 year olds in the United States currently in the early stages of their careers is projected to decline by 15 percent between 2000 and 2015 thereby substantially reducing the talent pool from which new leaders will emerge. The problem will be magnified as the number of 25 to 34 year olds continues to decline over the next decade, the predicted leadership gaps widens and organisations seek to find new leaders in an increasingly tight marketplace. Additionally, it has been reported that in 2000 the typical American worker had held nine jobs before reaching age 32 (Dobbs, 2001).

In Australia the situation is also uncertain with data indicating that a large percentage of its workers are due to retire in the next 5 to 10 years. Moreover, the labour force participation rate is projected to decline to 60.6 per cent, with the rates for men to decline in every age group except those aged 60 and over; and the participation rate of women projected to rise in every age group except 15-19 year olds and those aged over 65 (Australian Bureau of Statistics, 1999). Currently in Australia the average age of retirement has dropped to 48 years of age (Australian Bureau of Statistics, 1997).

As organisations strive to implement systems that address these current and predicted high levels of management attrition and turnover rates, succession management programs are receiving increasing attention (Baruch, 1999; Liebman, Bruer & Maki, 1996; Sullivan, 2000). In an attempt to strategically address this situation many organisations have started to internally target and develop talented staff using criteria that are linked to future organisational needs and role capabilities (Byham, Nelson & Paese, 2000). In other words, succession management approaches are being used to facilitate effective organisational positioning and development to ensure that within an organisation the 'right' leaders are available at the 'right' time (Rothwell, 2000).

In order to contextualise the growth of succession management approaches this paper will provide an overview of the components of succession management and a discussion of its divergence from succession planning. The key elements of effective succession management are outlined along with models of implementation. The nexus of theory and practice is illustrated through presentation of a case study outlining the implementation and evaluation of a succession management program in a large Australian public sector organisation. Kirkpatrick's methodological framework (as recommended in Rothwell, 1994) was used to assess the effectiveness of this succession management program. The program outcomes are also analysed in accordance with literature based claims about the benefits associated with succession management approaches.

Moving from succession planning to succession management

In the past, a common method used to determine likely replacements of senior managers was referred to as "succession

planning." The term referred to a systematic and regimented system of identifying job position replacement best used in relatively stable work environments. It relied heavily on performance management data and recommendations of key decision makers within the organisation (Rioux & Bernthal, 1999). The succession process was often decided and implemented in executive suites, behind closed doors, and surrounded by an air of secrecy. Promotion expectations were not always made clear and their measurement could be highly ambiguous (Liebman, Bruer, & Maki, 1996). Succession planning was not able to demonstrate success in the retention of talented staff and effective replacement of departing senior management and this caused many organisations to discontinue its implementation (Byham, Smith & Paese, 2001).

Succession *management* emerged from the recognition that succession planning was not able to effectively respond to organisational restructures, team based work systems, diversity issues, global outsourcing, or talent shortages (Baruch, 1999; Byham, Smith & Paese, 2001; Metz, 1998). Succession management was formulated as a fundamentally and philosophically distinct course of action from succession planning. Succession management is a process that is used in the identification and development of high potential and talented staff in the search for an effective way to deal with the changing work environments of contemporary corporations. Ideally, it is a transparent approach that is embedded in whole organisation decision-making and actively supported by all levels of management. Succession management incorporates a broader range of standardised performance evaluation methods and involves gathering information on employee performance from multiple perspectives. It is more thorough and supplements subjective manager judgements of potential with independent objective assessment data related to key capabilities. The process involves determination of required organisational capabilities, assessment and developing planning and program evaluation. Each of these steps will be discussed in more detail later in the paper.

There is consensus in the literature that a well designed and operated succession management process can deal with dynamic work environments as it can be continually realigned to reflect current organisational business strategies and vision (Leibman, Bruer and Maki, 1996; Rioux & Bernthal, 1999; Rothwell, 2000). The dynamic work environment to be served by succession management includes corporate downsizing, reengineering, decimated organisational levels, and broadened spans of managerial controls (Grossman, 1999).

In a definite change from succession planning techniques, succession management practices focus on identifying and developing leadership capabilities, not specific job requirements. Broadly based assessment measures and pools of potential leaders are preferred techniques for identifying individuals for particular positions. These processes are also intended to be more inclusive on diversity aspects (Caudron, 1996; Wallum, 1993). In theory, succession management processes are more objective than past methods of succession planning and are designed to redress perceptions of internal favouritism and 'mirror' or halo' effect decisions. It has also been suggested that diversity issues are better accommodated in succession management and that minority groups benefit from its more objective implementation model (Linkage & J. Howard & Associates, 1999). Research indicates that succession management efforts are most likely to be successful if they are embedded in management operations and involve HR and other managers throughout the organisation (Linkage, 1999; Walker, 1998) and are concerned with implications for other career planning practices such as formal education training or secondments (Baruch, 1999).

While succession management was initially conceived as an initiative mainly for the top echelon of business owners and managers in large companies it is now deemed as equally relevant for small and mid-size employers and family-run businesses (Randall, 1996). Due in large part to projected talent shortages and rising recruitment costs, not to have a succession management process in place has even been seen as bordering on negligence (Grossman, 1999). Succession management is no longer merely about replacement issues, but rather it is a strategic responsibility to be shared among the organisation's stakeholders (Schall, 1997). Leibman, Bruer and Maki (1996) have added that the increasing diversity of workforce and social expectations will force organisations to rethink leadership development efforts and implement more objective and inclusionary talent identification programs. This potentially presents an enormous opportunity for organisations via expanded work pools and increased diversity of ideas and values that could be addressed using succession management approaches (Eastman, 1995). Theoretically, sustaining innovation in organisations and responding to future organisational leadership needs should be embedded in succession management models.

While succession management is thus essentially a very different method from succession planning, in much of the practitioner-based literature the terms are used interchangeably (Eastman, 1995). In an effort to distinguish these two similarly named approaches the development and ascension of succession management programs is presented here.

Succession Management Components

In practical terms, succession management programs can be located anywhere along a continuum of application. At the top-end are processes aimed solely at CEO replacement, 'the process which plans an organisations' transference of ultimate executive authority from one to another and the outcome which implements the process' (Santora, Clemens, & Sarros, 1997: 109). At the other end of the continuum succession management programs expansively encompass leadership development at all levels within an organisation. That is, 'any effort designed to ensure the continued effective performance of an organisation, division, department or work group by making provision for the development and replacement of key people over time' (Rothwell, 1994:5).

Regardless of the particular organisation's location on the continuum, the developmental focus of succession management is a consistent component. This focus involves the process of creating a clear picture of existing human resource strengths, relating them to anticipated needs and identifying areas requiring action (Cornerstone Consulting, 1999). Succession management is also viewed as

a dynamic, on-going process of systematically identifying, assessing and developing leadership talents for future strategic tasks (Hagberg Consulting Group, 1999). Given this set of attributes, Walker (1998) has proposed that succession management might be better termed 'executive resource planning' or 'leadership depth assurance' to reflect its primary focus of developing staff capabilities. Byham, Smith and Paese, (2001) have added that the key to a successful succession management scheme is periodic re-evaluation along with buy-in and involvement of current executives.

While the components of an organisation's succession management program can vary as much as its scope of application, there are several critical elements that have been identified as key to effective succession management. Eastman (1995) has offered the following list of commonly reported effective practices:

- Receives visible support from the CEO and Top Management
- Is owned by line management and supported by staff
- Is simple and tailored to unique organisational needs
- Is flexible and linked with the strategic business plan
- Evolves from a thorough human resources review process
- Is based upon well-developed competencies and objective of candidates
- Incorporates employee input
- Is part of the broader management development effort
- Includes plans for development job assignments
- Is integrated with other human resource systems
- Emphasises accountability and follow-up.

These items are supported by international research that found highly effective succession management systems involved the CEO, had the support of senior management, involved line management identifying candidates, used developmental assignment, and linked succession management plans to business strategies (Purcell, 1995; Rioux & Bernthal, 1999; Tyson, 1997). The exact nature of the program will depend on the culture of the organisation. Where core business is relatively stable, standardised career development may be achieved with long-term career goals. In dynamic, turbulent business sectors it may be necessary to have short term plans which are revised each year or so.

A focus article on the Dow Chemical company in *Management Development Review* (1997:110) identified six transitions that are required in succession strategy:

1. From annual to continuous
2. Short term replacement to long-term development and retention
3. From what a company has to what it needs
4. Position blockage to turnover/promote deserving individuals
5. From insufficient depth to pool of talent
6. From subjective evaluation to emphasis on results.

Development of leaders is linked to a succession management system which clearly establishes competencies, is transparent in selection process, provides development opportunities and assesses these, provides guidance and feedback and aligns with a reward structure (Byham, Smith & Paese, 2001; Guinn, 1997; Leibman, Bruer & Maki, 1996). In the case of General Electric's program, it has been reported that the organisation has ensured continued leadership development through a succession management process that covers employees during critical career milestone points to prepare them for new leadership challenges (Linkage Inc. & University of Michigan, 2000).

It is suggested that many organisations under-perform in succession management because it is a complex process and not easily implemented. Liebman, Bruer and Maki (1996) proposed that problems associated with succession management can include:

- The reluctance of managers to release top talent for development
- The selection of potential leaders in "one's own image"
- Lack of valid and objective selection process
- Limited "buy in" by business unit executives who do not see significant benefits from an essentially corporate initiative
- Disappointment of internal high flyers when an external person is recruited
- HR department credibility can be problematic when succession management is seen as the human resource area driving a program no one wants; and
- An insufficient attention to focussed and broad development strategies.

In particular, existing studies have revealed that the management style of the CEO can be an indicator of his/her attitude to succession and the chances of success or failure of succession management within an organisation (Schall, 1995;

Sonnenfeld, 1997). Also, the composition of company boards has been found to impact succession processes. For example, Boeker and Goodstein's (1993) longitudinal study spanned 22 years and 231 succession events and revealed that the greater the proportion of insiders on the boards, and the greater the concentration of ownership among board insiders, the more likely it was that an insider would be selected. Hambrick, Geletkanycz and Frederickson (1993) found that there was a strong tendency for leaders to try and clone themselves, which influenced succession decisions. Anecdotal learning would also indicate that the identification and development of a pool of talented employees can have a deleterious effect on the morale of those outside the selected group and can also lead to expectations of fast tracking that organisations may not be able to fulfil. This latter issue is particularly relevant to the public sector where the current interpretations of merit selection and organisation structure may reduce timeliness and flexibility in capitalising on developed talent (National Academy of Public Administration, 1997).

Models of succession management

Rothwell (1994) has suggested that direction, timing, planning, scope, degree of dissemination and amount of individual discretion distinguish approaches to succession management. As previously discussed, there is a range of models for succession management and a continuum of implementation processes depending on the individual organisation's interpretation of the breadth of application of succession management. At its narrowest, the process would apply solely to the search for a new CEO and at its fullest it would be fully embedded into the organisation's entire staff recruitment, selection, training, development and promotion ethos. Regardless of scope, the first steps in developing an effective system of succession management have been identified as the determination of required capabilities for staff members, assessing current capabilities, and establishing a development plan for existing staff (Western Australia Ministry of the Premier and Cabinet, 1999).

Determining capabilities

The selection of key capabilities (or competencies) needed for success is often the first step in putting together a succession management plan. This begins with the analysis of the organisation's strategic plan and allied documents to determine behaviours necessary to achieve the organisation's goals. A range of methods is used to gather the information for this stage, and capabilities are validated using techniques such as:

- Visioning
- Critical incident identification
- Interviews with targeted high performing staff
- Experts in each domain
- Union involvement (where required)

Capabilities are not meant to be static and should be routinely reviewed, particularly if there is a change in business strategy or organisational structure. The identification and development of internal talent aims to foster a higher level of continuity of management. Having some pre-identified management capabilities and personnel assessed against these criteria can assist an organisation to meet both long-term and immediate managerial needs. With supportive human resources systems in place, decision makers will have access to more and better data on an internal candidate's performance than on outside candidates.

Assessment and Development Planning

Following the establishment of capabilities, identified employees are then assessed against these capabilities. Assessment techniques can involve the use of performance appraisal data, multi rater feedback instruments, personality and psychological testing, analysis of work samples, simulations/role plays. The choice of assessment will vary between organisations but it is recommended that assessments are valid, dated and transparent. After their assessment, participants are informed of their results including strengths and development opportunities. Development programs that target the participant's areas for improvement are then devised. These can include in-house training, formal education, job assignments, project based work, coaching and the like. The process should aim to foster continuous learning for all participants (Metz, 1998).

The establishment of an acceleration pool for nominated participants is a feature of some succession management schemes. In an acceleration pool system, high-potential candidates are identified and given training, coaching, and a wide range of professional experience within the organisation (Byham, Paese & Nelson, 2000). This identification and development of a pool of high potential employees marks another distinct change from earlier succession planning approaches. Large organisations might have more than one acceleration pool that could include a pool for supervisory level participants, one at middle management, and one feeding into senior levels. Each pool, which might encompass one or two organisational levels, would prepare people for the next major step in the organisation. The size of a pool will depend on the number of positions it is expected to supply and the selection ratio that the organisation would like to have in filling target positions. The number of acceleration pools reflects how an organisation is structured, as well as how it thinks about its high potential and talented employees. Organisations may incorporate formal mentoring or coaching programs for employees into acceleration pools.

A recent Bennis/Linkage survey (1999) of 5000 high performance organisations in the United States, identified 'exposure to senior executives' as the most critical program for accelerating the development of high potential employees. Common practices include the acceleration through rapid, successive functional assignments, tailoring assignments to match individual needs, customizing management education, training and recruiting talent below the level needed to 'mature' in 2-5 years time (Hambrick, Geletkanycz & Frederickson, 1993).

A case study in succession management

For many companies, thinking about succession management is about as far as they get. Estimates of the proportions of businesses with a formal succession management process in place range from a quarter of U.S. industry to about 10 percent to 15 percent (Guilford, 2000). In a survey of 19 companies in the United Kingdom (13 in the top UK "100"), 15 reported that they were actively engaged in managing succession within their organisation (National Academy of Public Administration, 1997). However, a number of organisations are implementing succession management processes and the following section will detail the introduction and evaluation of a succession management program within a large Australian public sector organisation.

Setting up the program

The case study organisation had no formal succession management or succession planning system in place prior to the introduction of the current scheme. The organisation did not have a consistent set of agreed leadership capabilities for internal staff and they were concerned about projections of up to 30 per cent senior staff retirements in the next three to four years. The organisation identified that leadership development and retention was a major issue for growing the business in the future and to effectively meet new business challenges. In response to this situation a succession management program was developed for the top three leadership tiers within the organisation.

Working with an external consultant the organisation designed, implemented and then evaluated a succession management process. The first step in the process was to undertake a capability profiling to meet the challenges of the next 3-5 years. A range of business plans, data on the organisation's vision and direction along with related data was analyzed for critical success capabilities. During this stage of the project the commitment and buy-in of senior managers across Australia was secured by using a two phase data collection process. The first phase was to hold 18 individual meetings with identified strategic leaders within the organisation to solicit input on behaviors required for effective leadership. This was followed by 18 focus group interviews with 108 operational leaders to gain their ideas on effective behaviors.

A draft list of capabilities was devised using the empirical and secondary data gathered with reference to previously validated leadership capabilities. The draft list was circulated in the form of questionnaires to a representative group of experts within the organisation for assessment. The participants were asked to rate the importance of the capabilities at their level, rank the capabilities in order of importance and indicate the percentage of the requirements for this management level covered by the capabilities. Using the latter input the capability profiles were then written to ensure clear statements that were organisationally relevant and integrated into existing competency frameworks. The profiles were created for use in recruitment and selection as well as in the second stage of internal participant assessment.

The next step was to identify candidates with leadership potential for the talent pools. That was achieved by conducting assessments using the capability profiles, performance ratings and observed skills and experience. During this stage of the process three groups were assessed; visionary/strategic managers, strategic/operational managers and operational/tactical managers. Table 1 outlines the demographic profile of the participants.

Table 1 : Succession management participant profile

| Level | Nos assessed | Male % | Female % | Average Age |
|-------------|--------------|--------|----------|-------------|
| Visionary | 54 | 83 | 17 | 45.2 |
| Strategic | 171 | 78 | 22 | 42.4 |
| Operational | 177 | 64 | 36 | 41 |

All candidates were provided with detailed feedback on their assessment performance. In conjunction with the debriefing all high potential candidates were provided with development plans and appropriate training programs. Each candidate's performance and development needs were then tracked conjointly with organisational requirements. As part of the continuous improvement and analysis process built into the program's implementation the overall effectiveness of the succession management program were evaluated after the first year.

Evaluating the program

The evaluation model was adapted from Kirkpatrick's hierarchy of evaluation. Table 2 outlines the four levels of evaluation and their components. The evidence for the evaluation was collected via interviews, video case studies and organisational data on development planning, placements and utility analyses.

Table 2: Evaluation Framework

| | | |
|--|---|------------|
| Level 1 Reaction | Measures of stakeholder perceptions of the effectiveness of the program | How satisf |
| Level 2 Learning & Program Progress | Focuses on what has been achieved | How well i |
| Level 3 Effective Placements | Behaviour change evidenced | What % of |
| Level 4 | Organisations ability to be effective | How is the |

A total of 57 interviews were conducted with a randomly selected stakeholder in the succession management program. These included four groups, talent pool participants (29) and their managers (9), HR managers (8) and group/general managers (11). The interview guides were developed by the external consultant in collaboration with the internal development unit. The interviews aimed to gather both quantitative and qualitative data on key aspects of the program.

All stakeholder groups reported highly positive reactions to the succession management program. On a 10-point scale the mean satisfaction was 7.5 and descriptors such as 'overdue' and 'great concept' were conveyed by the participants. There was no significant difference in ratings between the four groups. The benefits most commonly cited were the identification of talent to meet the leadership needs of the future (58%); development of leadership skills to improve both personal and organisational performance (26%); and creation of a structured process for assessment and development (23%). Concerns about the program were centered on perceived lack of follow-up to the process. In particular there was concern that 'nothing has happened' since the first development activity. It was also identified that more feedback on the impact of the program at the organisational level was needed. A minor concern was expressed about the impact the program had on staff who were not included, such as perceptions of elitism and jealousy.

The perceived usefulness and accuracy of leadership capabilities was rated high ($m=8.02$) with ratings below six on the 10 point scale. Overall the capabilities were reported to be comprehensive, accurate and reflective of best practice. Several interviewees noted that the capabilities were a good start and should be adaptable and reviewed regularly to reflect the changing needs of the organisation. The assessment and debriefing process was rated useful ($m=7.47$). While there were no significant differences between the four groups of the different levels, the participants with highest assessment scores rated the process higher ($m=8.57$) than those who were lowest in the bracket ($m=6.75$).

The development planning process rated positively ($m=6.62$) and there were no differences between the four groups. Interviewees who more satisfied with the assessment/debriefing process were also more satisfied with the development process ($r=.40$). Concerns identified were that the plans were impersonal or vague and did not target development needs relevant to their job. Another issue raised was manager involvement that ranged from very supportive to negative. Many participants reported that while their manager was supportive of development it was not made a priority, which corresponded with managers' comments about the difficulty in making time for development issues. Incidentally, participants and managers who reported greater manager involvement were also more satisfied with the development planning process ($r=.55$). An analysis of development activity indicated that the participants had completed 71 per cent of development activities. Activities have included: project work, courses, coaching and mentoring, on the job activities and a range of related actions. Analysis during the measurement period showed that 100 per cent visionary and 50 per cent strategic appointments were made from the talent pools.

Some 71 per cent of participants reported to have made changes to their behavior as a direct result of feedback from the assessment process. Eight of the nine managers interviewed also reported that they had observed behavior changes in their direct reports. The changes included: becoming more assertive and pro-active with ideas; delegating more to direct reports and being better with feedback; and becoming more team oriented; improving interaction skills such as listening, communication and empathy.

A return on investment and utility analysis were also undertaken to measure value of the program. Factors included in the calculations were the number of successful managers promoted from the talent pools, improvement in the validity of the selection process for promotion, estimated contribution back in tenure, estimated dollar value return on high performers, correlation of successful assessment results and on the job performance, and cost difference between new and old promotion process. As the monetary outlay was confidential the actual figures cannot be reported here but it can be revealed that there was a 286 per cent ROI.

Discussion

Succession management has replaced succession planning as an effective way for organisations to identify, develop and retain internal staff for leadership and management positions to meet future needs. It requires substantial ongoing organisational commitment across all levels of the business for successful implementation. A key component for success is support and championing the process not only at the highest levels but also all the way down the line. In particular, senior management must be prepared to provide support and development opportunities for staff identified as high potential. Targeted staff must commit to continual assessment and development and recognise that changing business environments and organisational needs might impact their progression (Guinn, 1997).

In the case study organisation, the above criteria were incorporated into the program design. As a result, a high level of expressed satisfaction with the succession management process and its implementation was evidenced in the program evaluations. The problems identified were associated mainly with individual responses and lack of a consistent level of support across the organisation. The employees targeted for development were more satisfied with the program than those who scored low on their assessments. This highlights the importance of effectively managing the assessment, placement and promotion components to ensure that employee dissatisfaction is minimised. While targeted staff appeared dedicated to continual assessment, development and feedback, they felt that some of their managers were

somewhat less committed. This aspect of the program will require monitoring, with the importance of involvement at all levels fully communicated to all staff.

In research on best practice in succession management Linkage (2000) reported that almost two-thirds of best practice companies filled vacancies with internal candidates. In the case study 100 per cent visionary and 50 per cent of strategic appointments were filled by internal candidates. These figures indicate that the program has been relatively successful in this regard. There are a number of other criteria on which an effective succession management system can be measured; however many of these dimensions require long term measurement. The responsiveness of the program to organisational restructures, fostering team development, encouraging diversity, and increasing globalisation entails continual evaluation over several years. In order to be effective and responsive to change the systematic analysis of succession management programs should be incorporated into the measurement of a program's performance. The organisational case study has demonstrated that significant benefits can accrue to a comprehensively designed, implemented and evaluated program. The program evaluation also highlights the depth of organisational support that is required for succession management to succeed and the critical importance of continuous evaluation. Succession management programs cannot operate in a vacuum within an organisation and require substantial employee commitment. While the benefits of succession management can be substantial without full organisational support such programs are unlikely to reach their full potential.

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