Operational succession planning: Chronology of Tasks and Instruments

Ismael Peña-López

Seasonal School on Talent Management
Structured Succession Planning for Future-Ready Public Administrations
10/06/2025
Podgorica: ReSPA

1

What do we need

HRM Strategy Unit

TRAINING		STRATEGIC PLAN
		KEY POSITIONS

Function frameworks

GUIDE	FRAMEWORKS

Competency frameworks

DICTIONARIES	FRAMEWORKS
GUIDE	

Professional profiles

GUIDE	PROFILES
	Generic
	Specialized
	Onboarding
	Top/senior
	Middle managers

KNOWLEDGE MANAGEMENT

Knowledge maps

GUIDE

MODEL

TRAINING

KNOWLDG MAPS

COLLABORATORS
Regular
Essential
Internal
External

Process maps & manuals

GUIDE

MODEL

MAPS

MANUALS

Document repository

GUIDELINES

TRAINING

DOCUMENTS

COMMUNICATIONS

- Communities of practice
- Clinical sessions
- Good practices bank
- KM unit

What is going to happen

Planned Annual Retirements

GUIDE	PLANS
MODEL	

Annual Analysis of Critical Job Positions / Critical Knowledge

GUIDE	CRITICAL POSITIONS
MODEL	Diagnosis/inventory Analysis Calendar/schedule

Planned Annual Retirements

GUIDE	PLANS
MODEL	

- Recruitment
    - Awareness raising among new generations
    - New selection processes
    - Talent / graduate fairs, media
    - Open educational resources for candidates

- Selection unit
    - Stable selection boards
    - Training for selection boards

- Scoreboard
- Analysis of the staff's ages and their evolution
- Goals, KPI

Planned Annual Retirements

GUIDE	PLANS
MODEL	

Analysis of the staff's ages and their evolution
- Job
- Position
- Area of work
- Employee type
- Age

What positions will become vacant

Impact
- Which services are most affected by upcoming retirements?
- Which types of positions are most affected?
- Are there any mass retirements in any of the groups, areas, or services?

Planned Annual Retirements

GUIDE	PLANS
MODEL	

STAFF AGING ANALYSIS

Staff	[number]	
Overall average age	[number]	
Highest average age	Type of position	[list]
	Organisational area	[list]
Highest proportion of the 55+ age group	Type of position	[list]
	Organisational area	[list]
% aged 55+ out of the total staff (A)	[number]	
% aged 35- out of the total staff (B)	[number]	
Aging index (A/B)	[number]	
Ordinary retirements forecast	[number] [%]	

Adapted from Busquets Montes & Macià Losada (2021)

Annual Analysis of Critical Job Positions / Critical Knowledge

GUIDE	CRITICAL POSITIONS
MODEL	Diagnosis/inventory Analysis Calendar/schedule

Critical positions

- Key positions integrated within the 'critical' services of the service map
  - What do they do
- Key positions based on their function or position within the organization
  - Who are they
- Key positions due to the impact of mass retirements
  - How many are they

Criteria	Review profiles, functions
• Impact • Risk • Urgency	• Maintain • Transform • Remove

PLANNING	Annual Analysis of Critical Job Positions / Critical Knowledge

GUIDE

MODEL

CRITICAL POSITIONS
Diagnosis/inventory Analysis Calendar/schedule

CRITICAL KNOWLEDGE ANALYSIS

Kind of knowledge	Process, project, area of knowledge, software, access…
Description of knowledge	[description]
Owner	[name]
Impact	0 [none] – 1 [low] – 2 [high] – 3 [critical]
Risk	0 [none] – 1 [low] – 2 [high] – 3 [critical]
Urgency	0 [none] – 1 [low] – 2 [high] – 3 [critical]
Priority	0-9

Adapted from EAPC (2024b).

PLANNING		Annual Analysis of Critical Job Positions / Critical Knowledge

GUIDE	CRITICAL POSITIONS
MODEL	Diagnosis/inventory Analysis Calendar/schedule

CRITICAL POSITION ANALYSIS

Functional profile	
Function (generic – mission)	Functions (specific – area of work)
	Functions (specific – position)
Competency profile	
Competencies (specific). Name and definitions	[set optimum level]
Competencies (generic). Name and definitions	[set optimum level]
Required training	
Mandatory	[list]
Complementary	[list]

Adapted from Busquets Montes & Macià Losada (2021)

How are we going to do it

Annual Analysis of Critical Job Positions / Critical Knowledge

GUIDE		CRITICAL POSITIONS
MODEL		Diagnosis/inventory Analysis Calendar/schedule

Talent map (I) or 9 box grid

	Needs development	Meets expectations	Exceeds expectations	
High potential	**Develop** (untapped talent)	**Develop / stretch** (high potentials)	**Incentives for retention** (exceptional talent)	**Retain**
Average potential	**Dilemma (observe)** (inconsistent performer)	**Core** (reliable team player)	**Develop / stretch** (strong contributions)	**Deployed potential**
Low potential	**Consider termination** (underperformer)	**Effective (observe)** (effective performer)	**Trust** (trusted professional)	**Incentivise**
	Low performance	Average performance	High performance	

14

Talent map (II)

Annual Analysis of Critical Job Positions / Critical Knowledge

GUIDE
MODEL

CRITICAL POSITIONS
Diagnosis/inventory Analysis Calendar/schedule

MORE POTENTIAL

LESS POTENTIAL

LESS EXPERIENCE   MORE EXPERIENCE

Adapted from Busquets Montes & Macià Losada (2021)

SUCCESSION & ONBOARDING

Succession

GUIDE		DOCUMENT

TRAINING

Handover

GUIDE		SCHEDULE

TRAINING

Critical positions

TRAINING

Mentoring (critical positions)

GUIDE	TRAINING

Onboarding

GUIDE	TRAINING

Overlap (mirror jobs)

NORM		SCHEDULE

Mentoring (succession)

GUIDE		SCHEDULE

Succession

GUIDE	DOCUMENT
TRAINING	

Handover

GUIDE	SCHEDULE
TRAINING	

Document repository

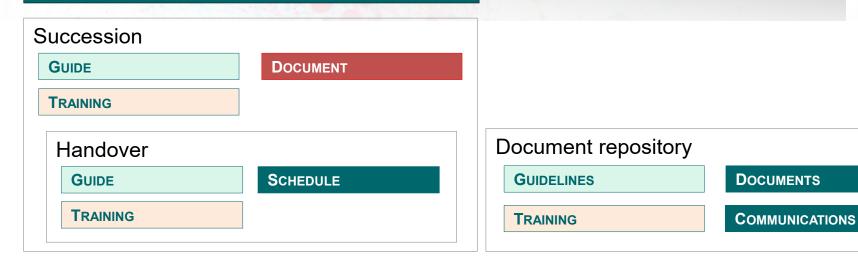| GUIDELINES	DOCUMENTS
TRAINING	COMMUNICATIONS

What is going to be handed over / transferred?
- Explicit knowledge
  - How knowledge is going to be kept, specific measures
- Tacit knowledge
- Supervisor oversight

Mechanisms to transfer knowledge
- Document repository
- Mirror jobs
- Seminars, Training
- Communities of practice
- Mentoring

SUCCESSION & ONBOARDING

Succession

GUIDE	DOCUMENT
TRAINING	

Document repository

GUIDELINES	DOCUMENTS
TRAINING	COMMUNICATIONS

KNOWLEDGE TRANSFER FILE

Identification	Name, job, position, area, etc.
Team	Supervisor, team/unit, collaborations (internal, external)
Functions	Goals, functions, tasks, [management tasks]
Competencies, knowledge	Knowledge, competencies, level required/optimum, training needs
Instruments	Tools, methodologies, resources
Documents	Type, format, source, etc.
Projects (completed)	Strategic projects, instrumental but necessary [reason]
Projects (ongoing)	Stage, importance/impact, assessment
Risk assessment	Complicated situations forecast, fragile issues in job, approaches
Conflict assessment	Complicated relationships forecast, fragile issues in job, approaches
General recommendations	Recommendations, suggestions, advice

Adapted from Busquets Montes & Macià Losada (2021)

SUCCESSION & ONBOARDING

Succession

GUIDE	DOCUMENT
TRAINING	

- Training on managing talents

- Audit of talents skills/capabilities
- Government-wide talent database
- Functional/hierarchical talent pools
- Talent matrix evaluation

- Individual tracks for high performers
- Spot star performer and fast track
- Talent pipeline for high potentials

- Job rotation programmes
- Internal talent exchange programmes
- Shadowing/mentoring junior-senior

- External talent exchange programmes
- Fast track entry programmes

OECD (2021). Ageing and Talent Management in European Public Administrations

What do we want to do well

Communication strategy

PROTOCOL	INSTITUTIONAL MESSAGES
PROTOTYPE	EVENTS
	WEBSITE
	COMMUNITY

Bibliography

Bibliography

Busquets Montes, S. & Macià Losada, M. (2021). *Guia de relleu generacional per als governs locals*. Guies d'innovació i gestió estratègica dels Recursos Humans per als governs locals, n. 4. Barcelona: Diputació de Barcelona.

Busquets Montes, S. & Macià Losada, M. (2022). "Plan de actuación para los procesos de relevo generacional en las entidades locales". In *Revista Vasca de Gestión de Personas y Organizaciones Públicas*, 23, 163. Vitoria-Gasteiz: Instituto Vasco de Administración Pública.

Escola d'Administració Pública de Catalunya (2024b). *Guia per a la gestió del coneixement crític a les administracions públiques de Catalunya*. Barcelona: Escola d'Administració Pública de Catalunya.

OECD (2021). *Ageing and Talent Management in European Public Administrations.* A report prepared by the OECD for the Slovenian Presidency of the Council of the European Union. OECD Public Governance Reviews. Paris: OECD Publishing.

Gràcies!

To cite this document:

Peña-López, I. (2025). *Operational succession planning: Chronology of Tasks and Instruments.* Seasonal School on Talent Management: Structured Succession Planning for Future-Ready Public Administrations, 10/06/2025 Podgorica: ReSPA

https://w.ictlogy.net/5755

To contact the author:
https://contact.ictlogy.net