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# Mentoring and succession planning

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**Professor David Clutterbuck**  
**Practice Leader**

Clutterbuck Associates  
Grenville Court, Britwell Road,  
Burnham, Buckinghamshire SL1 8DF  
Main Office: +44 (0)1628 606 850  
Email: [info@clutterbuckassociates.co.uk](mailto:info@clutterbuckassociates.co.uk)

# Mentoring and succession planning - A key business partnership

Succession planning is becoming one of the most critical people issues in large organizations, for a variety of reasons. Among them:

- Although the recession has dampened job movement in general, it has in many cases increased pressure on talent – stealing really good people, who can make a significant difference, has become a priority for businesses seeking competitive advantage
- Many of the most talented people in organizations, particularly those in their 20s and early 30s, are among the most concerned to protect their non-work lives – and hence less prepared to make the sacrifices inherent in a mentality of “the job comes first”
- Traditional, mechanical succession planning processes are manifestly not living up to their promise – the wrong people often still get to the top, destroying organizations (witness some of the recent financial service company collapses) and talent pools often show inadequate levels of diversity

Mentoring has a major role to play in making succession planning deliver real value for organizations. It creates or supports conversations about careers and personal ambition that are difficult to encompass elsewhere. It opens horizons, by helping people recognise options they had not previously considered and raising the level of their ambition. It opens windows, by helping people gain an insight and feel for functions and roles, which they have little experience of. And it opens doors, by connecting the mentee to other people and resources, potentially influential in achieving their career ambitions.

## Career conversations

From our research into succession planning, it is clear that one of the most significant needs is for greater quantity and quality of conversations about career progression. We have defined four levels of conversation:

1. Inside the head of the employee – Who do I want to be and why? What values do I hold, that help me define my career ambitions? What is my personal dream?
2. Between the employee and his or her immediate work environment – their boss and colleagues – How can we construct and constantly adapt roles, so that they maximise job commitment and provide constant opportunities for challenge and growth?



3. Between the organization and the employees generally – To the best of our knowledge, what is going to happen to careers in this organization over the foreseeable future?
4. Between the social networks of the organization and those of its employees – How do we engage with the people our employees engage with?

Mentors have a role in each of these conversations. At level one, they can help the mentee better understand themselves and their motivations. As role models, they can explore what it's like, for example, to be in a more senior management role and transfer some of the thinking patterns necessary to operate at that level. By expressing belief in the mentee's ability, they also help them to set their sights higher and to achieve more, faster. At level 2, a mentor can help the mentee work out where they can find challenge in their current job role and act as a sounding board, for conversations the mentee needs to have with their boss, about the work tasks they are assigned and how these can be made more stretching.

At level 3, the mentors collectively can influence how the organization understands the talent it has. Bringing mentors together to share experiences and perceptions can be a powerful way to identify issues, which are blocking the effective use of talent. In one case, it led an organization to completely remake its succession planning strategy, to create two career streams. Until the feedback from mentors, the organization had not listened sufficiently attentively to a large group of employees in specialist roles, who did not want to progress through a managerial route. Other organizations have taken the path of regularly briefing mentors about how the internal career market is developing, so that mentors can use this information in helping the mentee think through their career strategy.

Engaging the mentors in this way also helps the organization think more strategically about its use of talent. Rather than focus solely on fitting talented employees in pre-set roles, the organization can also consider how it might capitalize on the qualities of the talent pool, designing job roles to fit the talent resource.

At level 4, the informal network between mentors and mentees, who have now moved on to roles in other organizations, is a powerful resource that deserves a lot more attention than it usually receives. One use of this resource is re-recruitment – enticing back talented people after they have added to their experience elsewhere. Maintaining the mentor / mentee relationship informally makes it easy for either party to open a conversation about new openings in the organization. Another use is to tap into former employees' social networks – who do they know, who is acquirable and has talents and experience the company needs?



## Creating a healthy succession environment

Mentors also have a plethora of roles in creating a healthy environment for succession planning and career management. Among these roles are:

- Getting to know talent at an intimate yet objective level. Particularly if the mentor is two or more levels more senior, their knowledge of the mentee can be invaluable in gaining a real understanding not just of what talent there is, but how willing it is to be employed in different ways. Too much succession planning assumes without evidence that employees will want to take promotions offered to them – but if the planned move does not align with the employee’s own career intentions, it can have the negative effect of either causing them to fail, or encouraging them to leave. Even if a mentor only knows a few people at lower levels with this degree of insight, collectively it helps to bridge the gap between the top level perception of the talent pool, and the perceptions of the talent pool members themselves. Organizations, where mentoring is widespread, tend to have much richer conversations about how they allocate, use and develop their talent
- Focusing mentees’ attention on internal career opportunities. It’s common for people to look outside their current organization for their next job, partly because it’s easier (especially through social networking and job search websites) and partly because it avoids letting your boss and/ or colleagues know that you are thinking of moving on. In the non-threatening environment of a mentoring conversation, however, it is much easier to open up about such issues. Moreover, the mentor will typically have a different and often wider perspective about opportunities for job moves than would, say, the mentee’s line manager
- Addressing diversity issues. Case study data reveals that having a mentoring programme, which people from minority or disadvantaged groups are encouraged to join, has a remarkable impact on the perception that people in those groups – whether mentored or not – have about their potential to advance in the organization. This has several beneficial effects. One is to encourage them to put themselves forward for promotions and projects that enhance track record – and hence get themselves noticed. Another is to motivate them to take a stronger commitment to their own development, because the ratio of perceived effort to perceived likelihood of reward has become more positive
- Influencing the systems that influence succession planning. With help and encouragement from a mentor, mentees learn how to work with, rather than in conflict with systems such as appraisal, access to learning resources and how work is allocated. For example, mentors often help mentees identify and recognise the value of horizontal moves that build breadth of experience and expertise



- Managing reputation. Sponsorship mentoring typically involves some form of active promotion on behalf of the mentee (or protégé). While this isn't encouraged in less directive forms of mentoring, there is still a great deal of room for helping the mentee acquire the skills of managing both politics and their own reputation. Given that much talent in organizations goes unnoticed, because it does not self-promote, mentoring can provide a practical way of helping people become visible and, at the same time, authentic

## Mentoring the talent pool

We don't like the term "talent pool", not least because the word most frequently associated with pool is "stagnant"! We prefer "talent wave", which suggests constant progress, change in shape and immense, unstoppable energy. Whatever we call it, however, recent years have seen considerable innovation in how organizations can use mentors to support the talent wave. For example:

- In the context of action learning. In addition to mentoring each other, members of action learning sets can gain great value from having individual mentors, who help them make sense of both individual and collective learning, link learning from the action learning project to learning about themselves as leaders, and challenge their thinking around the task. When everyone in the set has a mentor, the quality of dialogue in the set meetings tends to be higher
- Shadow Boards. This is where a small group of junior managers and/or professionals from the talent wave meet a week or so ahead of the real Board or top team and consider the same papers. The meetings are chaired by a member of the real Board or top team. The Shadow Board gain deep insight into strategic thinking at more senior levels and the Board gets a sanity check on its own thinking and perspectives, from within the organization. The chair of the Shadow Board meetings typically acts as a mentor to the group as they make sense of the issues they discuss
- Portfolio mentoring. Rather than confine talented employees to just one mentor, who is expected to meet all their needs, portfolio mentoring recognises that the most talented people have the greatest need to be challenged. So they are encouraged to develop a number of simultaneous mentoring relationships for different needs. Some of these relationships may be long term, others may involve no more than two or three meetings over a relatively short period. Success factors for portfolio mentoring appear to include:
  - Strong expectation of two-way learning
  - High initial clarity of purpose for short-term relationships; moderate initial clarity for longer term relationships
  - A variety of distance in terms of mentor job role vis-a-vis mentee job role
  - Feedback from the mentee to the mentors, both individually and collectively
  - Recognition and articulation by the mentee of the value of the mentors' help



One of the side-benefits of portfolio mentoring is that it builds the mentee's networks across and sometimes outside the organization; and hence facilitates cross-functional communication more generally.

## **Where do we go from here?**

Our view is that organizations are still only tapping into a small proportion of the potential for mentoring to support and to a considerable extent "fix" succession planning. Integrating mentoring more firmly with the HR systems that underpin succession planning would help it become less robotic, more human; less a closed box, more a dynamic dialogue; less HR driven and more driven by an enlightened alliance of interests, including line managers and, of course, employees themselves.