

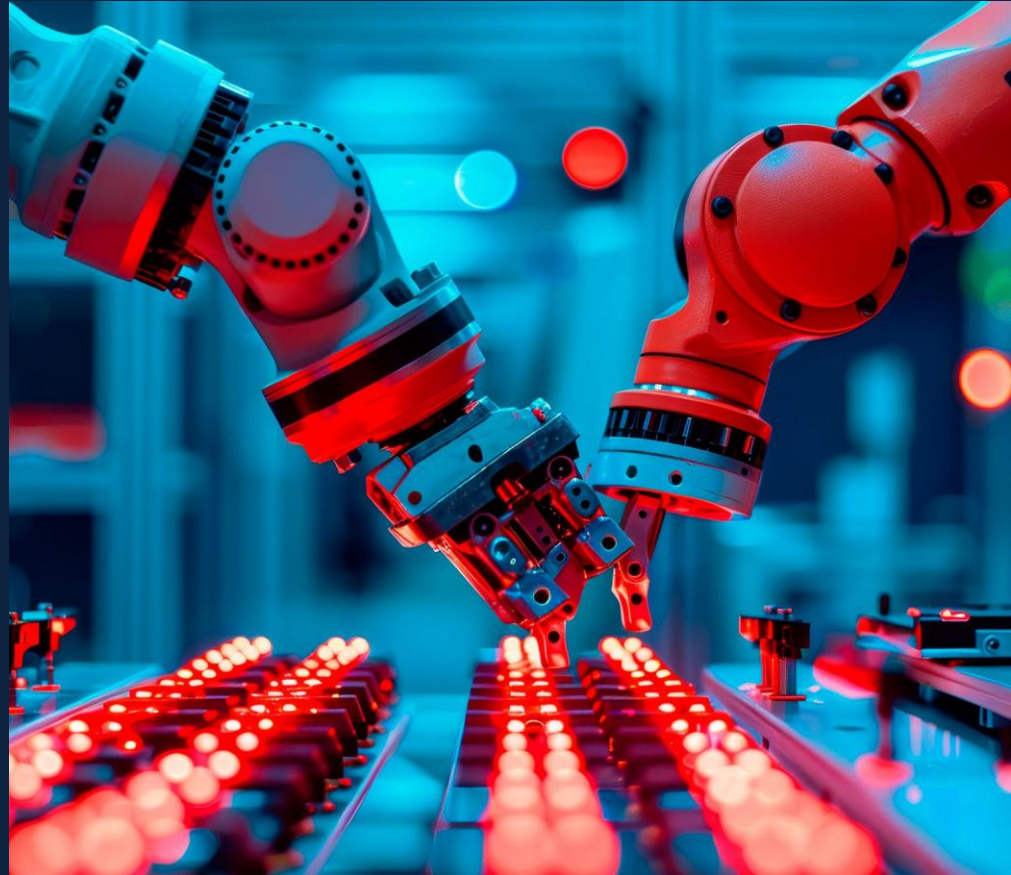
Industry Extension Services

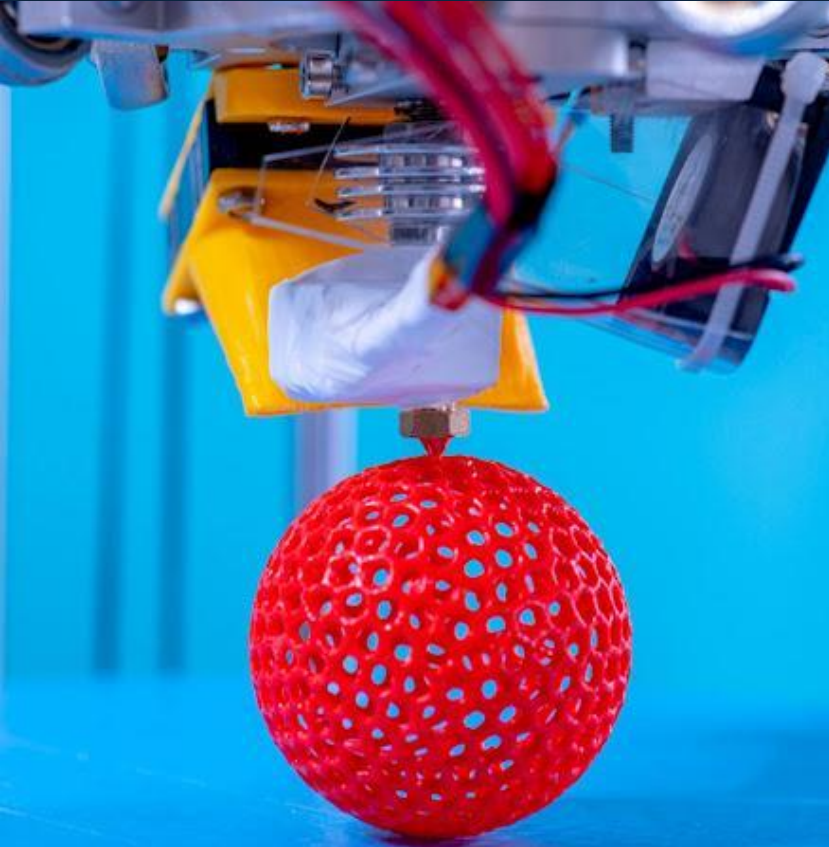
Succession Planning

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Who is Industry Extension Services?

University Extension Partner with business and industry to transfer knowledge and support next-generation technologies.

A Public/Private Performance Model:

- » State Appropriations
- » Federal Funding
- » Revenue-based Activities

Industries Served:

- » Small-medium Size Manufacturers
- » Educational and Research Institutions
- » Healthcare and Pharmaceutical Companies
- » Defense Contractors
- » Aerospace and Energy Sectors
- » Government Agencies

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Expertise

- » Advanced Manufacturing + Technology Adoption
- » Business Growth, Innovation + Marketing Solutions
- » Cybersecurity Strategies
- » Defense Industry Initiatives
- » Energy + Environmental Solutions
- » Grant Evaluation + Research
- » Instructional Design Services
- » Leadership + Organizational Coaching
- » Process Optimization + Training Within Industry
- » Quality + Management Systems
- » Supply Chain Optimization + Supplier Matching
- » Workplace Health + Safety

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What is Succession Planning?



Succession planning is a **strategic process** that identifies critical roles within an organization and prepares qualified employees to assume those positions when vacancies occur.

Rather than reacting to unexpected departures, succession planning creates a pipeline of talent that ensures **leadership continuity** and **long-term organizational success**.

Why It Matters



Ensures Business Continuity

Keeps critical operations running.



Builds a Strong Talent Pipeline

Prepares future leaders from within.



Drives Long-Term Success

Supports stability and growth.



Increases Employee Engagement

Shows a commitment to career development.



1. Think about the top 2-3 people on your team.

2. Name, face, everything they do.

3. Now imagine they all left...

4. Feel tension?

That's a good sign to start planning.



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Questions Leaders Should Consider



- Which roles pose the greatest risk if they become vacant?
- Are our successors ready to step in today?
- Could we maintain business continuity after an unexpected leadership departure?
- Are we intentionally developing internal talent while leveraging external hiring when needed?

Determine your Current State...

Evaluate your current workforce and leadership pipeline.

Do you have the Talent Bench?

Assess whether you have employees who are prepared to step into critical roles when needed.

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Two Buckets, One Goal

Succession Planning

Focuses on business continuity.
Identifies critical positions and successors for said roles.

Answers: **"Who is ready to step into this position?"**

High-Potential Management

Focuses on employee growth and leadership potential.
Develops individuals who may become future leaders.

Answers: **"Who has the potential to take on greater responsibility?"**



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The Process: Right People, Right Roles

Five steps to bring the right people to the right roles.

1.

Identify

Critical roles in
your internal
pipeline

2.

Assessment

Evaluate top
performers &
high-potential
candidates

3.

Review and Calibrate

Leadership
reviews of people

4.

Development Planning

Create IDPs — a
roadmap for
each person

5.

Track / Measure

Have they been
successful?

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Identify Critical Roles

Identify critical roles in your internal pipeline.

Organizational Risk KPI

**Roles Without a Named Successor ÷ Total Critical Roles
× 100 = % at Risk**

- » Track this as a standing metric — an ongoing discipline leadership can monitor over time.



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Assessment:

9-Box Grid Method

POTENTIAL		Under Performance	Effective Performance	Outstanding Performance
	High Potential	Box 5: Seasoned professional capable of expanded role, but may be experiencing problems that require coaching and mentoring.	Box 2: Does extremely well at current job with potential to do more; give stretch assignments to help prepare for next level.	Box 1: Consistently performs well in a variety of assignments; superstar employee. Big picture thinker; problem solver; self motivated.
	Medium Potential	Box 8: With coaching, could progress within level; focus on stretch goals for this employee.	Box 6: May be considered for job enlargement at the same level, but may need coaching in several areas, including people management.	Box 3: Current role may still provide opportunity for growth/development; focused on tactical; focus should be on helping improve strategic thinking.
	Low Potential	Box 9: May be a candidate for reassignment, reclassification to a lower level or to exit the organization.	Box 7: Effective performer, but may have reached career potential; try to coach employee on becoming more innovative, focus on lateral thinking.	Box 4: Experienced high performer but has reached limit of career potential. Still a valuable employee and can be encouraged to develop communications and delegation skills.

The 9-box grid is an individual assessment tool that evaluates an employee's current and potential level of contribution to the organization. The vertical columns of the grid indicate growth potential, and the horizontal rows identify whether the employee is currently below, meeting or exceeding performance expectations. The intersection of the two determines the employee's current standing and where development may be needed.

The 9-box grid is most commonly used in succession planning as a method of evaluating an organization's current talent and identifying potential leaders. When leadership performance and potential are assessed and plotted on the graph, individuals in the upper right quadrant (Box 1) are identified as high-potential candidates for succession, while those in the lower left quadrant (Box 9) may need to be reassigned or removed from the organization.

Source: SHRM.org

Understanding the 9-Box Grid Method

Performance (horizontal) vs. Potential (vertical). Source: SHRM.org

Individuals in the top-right box are strong succession candidates; those in the bottom-left may need reassignment.

	Under Performance	Effective Performance	Outstanding Performance
High Potential	Diamond in the Rough	High Potential	Future Leader
Medium Potential	Inconsistent Player	Core Player	Growth Employee
Low Potential	Reassignment Candidate	Effective Performer	Experienced Professional

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Two Common Traps

Skill $\neq$ Competency

Too often, we promote on skill over competency.

You may have a great line worker — strong on skills — who isn't yet a well-rounded fit for a leadership role's overall competency.

Don't Get Stuck!



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Review & Calibrate

Leadership reviews of people — who is ready now, in 1–2 years, or 3–5 years?

Ready Now

- » Candidates prepared to step into an identified role today–identified successors.

1–2 Years

- » Candidates who need focused development before they're ready.

3–5 Years

- » Longer-runway candidates with strong potential.
- » This is good practice for ongoing performance conversations.

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Development Planning

- » Create Individual Development Plans (IDPs)
— a roadmap for each person.

Based on Assessments, Ask

- » Where do people fall on the grid? What are their career goals, strengths, and action areas? Are they ready now — or on a longer runway?

Preparing for the Future Role– Leadership Training, Mentoring, Formal Education, etc.

Should also do this exercise with individuals who are not identified as “successors.” May lead to performance conversations/external hires.

The 70–20–10 Model

70%

On the job

20%

Learning through others

10%

Formal training

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Track & Measure Progress

REVIEW

Conduct annual or semi-annual talent reviews.
Revisit critical roles and successors.

MEASURE

Evaluate the effectiveness of your succession plan.

- Are successors becoming more prepared?
- Are development plans producing results?
- Are leadership gaps decreasing?

ADJUST

Update development plans and successor assignments as employees and business needs evolve.

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Preparing for a Successful Transition

Preserve Institutional Knowledge

- Document key processes and procedures.
- Capture critical relationships and expertise.
- Use mentoring, coaching, and job shadowing.
- Record lessons learned before departure.

Transition Responsibilities

- Create a structured transition timeline.
- Gradually transfer responsibilities.
- Allow overlap between outgoing and incoming employees.
- Confirm the successor is prepared before the transition is complete.



Who Owns Succession Planning?

Leaders & Managers

- » Own succession planning for their own teams and critical roles.

HR

- » Hosts and guides the process across the organization.

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Tracking Chart

Upcoming Org Changes	Current Capabilities	Capabilities to Address Change	Action Steps	Action Step Owners
Critical production leadership role could become vacant unexpectedly.	Several supervisors demonstrate strong performance but have not been evaluated for future leadership roles.	Decision-making, business acumen, communication, people leadership.	Complete talent assessment, identify successor pool, develop individualized development plans, review progress quarterly.	Leadership Team & HR

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Start Now.

Pick one critical role. Have one honest conversation.

QUESTIONS?

Thank you for joining today's webinar.

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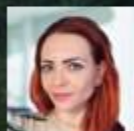
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