

BRITER™ · ORGANIZATIONAL INTELLIGENCE OPERATING SYSTEM · LEVEL 4 APPLICATION

Who Comes *Next*.

Succession planning, the tools that carry it, and why an organization cannot afford to build readiness after it needs it.

SYSTEM

BRITER OIOS

ANCHOR

Leadership Conversation Standard

PILLAR

Resilience

APPLICATION

Succession Planning

01

PART ONE

Why organizations *need* succession planning.

Every organization already has a succession plan. Most of them are just accidental.

When no one is ready, the organization pays *four times*.

O1

Continuity breaks

A departure becomes a crisis. Institutional knowledge walks out the door and the work stalls while the role is backfilled.

O2

Trust erodes

People watch outside hires fill roles they were never told they could grow into. The message lands: growth happens elsewhere.

O3

Talent leaves

High-capability people don't leave for money as often as they leave for a pathway they cannot see.

O4

Leaders are set up to fail

A person promoted without developed readiness inherits a role they were never coached toward — and the team absorbs the learning curve.

Succession is not a chart of *names*.

A chart is an inventory. It records who might fill a role. It does not develop a single person. Naming a successor and developing a successor are entirely different acts of leadership.

What most organizations do

- Identify a name in a private HR file
- Rank people as "ready / not ready"
- Review the chart once a year and file it
- Tell the person nothing
- Treat readiness as something a person either has or doesn't

What BRITER succession does

- Defines the future **role** before naming a person
- Names specific competency gaps as **information, not verdicts**
- Builds readiness through recurring conversations
- Includes the person in their own development
- Treats readiness as something **developed on purpose**

Where succession sits in the *operating system*.

BRITER Philosophy

LEVEL 1 • WHY IT EXISTS

Meaning before method. Leadership develops people before it develops performance. A succession chart develops no one; a conversation that helps a person make meaning of the distance between roles does.

Leadership Conversation Standard

LEVEL 2 • NEVER CHANGES

Readiness is built through Acknowledgment, Recognition, Precise Praise, Feedback, Coaching, and Correction — the same standard, aimed at a future role.

Conversation Frameworks

LEVEL 3 • SUPPORT THE STANDARD

CEO Conversation Model (during), QuickCoach (before and after), Dialogue Continuum (which conversation is needed), Feedback Loop (reflection and adjustment).

Succession Planning

LEVEL 4 • APPLICATION

The forward-looking sibling of Onboarding. Not a new methodology — an application of the same system to the question of who grows into what, and how.

THE RULE

Succession planning introduces no new model. If it feels like a separate methodology with its own language, it has drifted from the system.

Two gaps sit between the role someone holds and the role they're *growing toward*.

The skill gap

Visible, nameable, coachable. Financial acumen, delegation, systems thinking, facilitation, conflict navigation. This is the gap plans usually capture — and it is the easier of the two.

The mindset gap

The identity shift a larger role asks for: from doing the work to developing the people who do it. Invisible, uncomfortable, and the reason capable people stall after promotion.

Skill gaps announce themselves. Mindset gaps hide behind competence — a person can be excellent in their current role and entirely unprepared for the next one, because the next one requires them to stop being excellent at the thing they're known for.

Every tool that follows exists to make one of these two gaps visible, then to close it through conversation rather than assignment.

WHY THIS MATTERS FOR TOOL CHOICE

Assessments and canvases surface the skill gap. Only coaching conversations close the mindset gap. An organization that buys the first and skips the second will have a full binder and no ready leaders.

02

PART TWO

The tools, and *how to use them.*

Eight instruments. One system. Each one answers a different question, and none of them works alone.

Each tool answers *one question*.

TOOL	THE QUESTION IT ANSWERS	OWNER & RHYTHM
Competency Scope Canvas	What does the future role actually require?	Leader + HR · once, revisited annually
Competency Self-Assessment	Where is this person today , in their own account?	Employee · twice a year
Gap Analysis	What is the distance — in skill and in mindset?	Leader + employee, together · annually
Intentional Growth Plan	What is the one focus, one move, one milestone ?	Employee, coached · quarterly
Dialogue Continuum	Which conversation type does this moment need?	Leader · before every conversation
QuickCoach + CEO Model	How do I prepare for and hold the conversation?	Leader · every readiness conversation
One-on-One Form	How does readiness stay alive between reviews ?	Leader + employee · biweekly
Reflective Accountability Form	What did the person own and learn from the stretch?	Employee · after each milestone

Competency Scope *Canvas*

WHAT IT IS

A one-page definition of a role's real requirements — outcomes, behaviors, and the competencies that carry them.

WHY IT COMES FIRST

Most succession plans start with a name and work backward. Start with the **role**, or you will develop a person toward a job no one has defined.

WHAT IT PRODUCES

The target column of every assessment and gap analysis that follows.

HOW TO USE IT

- 1 Name the outcomes**
What this role is accountable for producing — not the tasks it performs.
- 2 Name the behaviors**
What someone doing this role well is observably doing, weekly.
- 3 Select 5–7 competencies**
Not fifteen. The ones without which the outcomes do not happen.
- 4 Set the target level for each**
Awareness · Applying · Proficient · Leading others in it.
- 5 Only then consider people**
Fit is measured against the canvas, not against the current occupant's personality.

Self-Assessment, then *Gap Analysis*

02 · Competency Self-Assessment

The person rates themselves first. Not because self-ratings are accurate, but because development requires the person's own account of where they are. A gap someone hasn't named for themselves is a gap they will defend.

- Employee rates current level against the canvas targets
- Leader rates independently — **do not share ratings first**
- Compare in conversation; the difference between the two is the most useful data in the tool

THE FRAMING THAT MAKES OR BREAKS IT

A gap is information, not a verdict. Said as a verdict, it produces defensiveness. Said as information, it produces a plan.

03 · Gap Analysis

Held together, not delivered. Current level vs. target level for each competency — plus the mindset shift the role asks for. Two to three priority gaps, never eight.

- Rank gaps by **impact on the future role**, not ease of closing
- Name the mindset shift explicitly — from doing to developing
- End by asking: **"What does this look like from where you sit?"**

Intentional Growth *Plan*

WHAT IT IS

The development plan that closes the priority gap. **One focus, one move, one milestone** — reviewed, not filed.

WHY PLANS FAIL

They list eight development areas, no owner, and no date. A plan with eight priorities has none.

WHO HOLDS THE PEN

The **employee** writes it. The leader coaches it. Ownership cannot be assigned.

HOW TO USE IT

1

Pick one competency

The highest-impact gap from the analysis. One.

2

Choose the developmental move

A stretch assignment, a cross-functional project, a role rehearsal — real work, not a course.

3

Define the visible milestone

What will be observably different in 90 days, and who will see it.

4

Name the support

Who coaches, who sponsors, what access the person needs to succeed.

5

Set the review date before you leave the room

An unreviewed plan is a document, not development.

Dialogue *Continuum*

Before any readiness conversation, the leader decides which conversation the moment actually needs. Most succession conversations fail because a leader coached when the person needed clarity, or corrected when the person needed recognition.

IF THE PERSON Doesn't yet see the gap Start with Feedback. Specific, observed, non-evaluative. The gap must be visible before it can be worked.	IF THE PERSON Sees it and wants to close it Move to Coaching. This is the center of succession work — the CEO Model carries it.	IF THE PERSON Is starting to demonstrate it Precise Praise. Name the specific behavior of the future role, the moment it appears.	IF THE PERSON Has agreed and not moved Correction — accountability to their own stated plan, held with care and without ambiguity.
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WHY IT BELONGS IN THE TOOLKIT

The Continuum is Level 3 — it serves the Standard, it does not replace it. It is the diagnostic that keeps a leader from having the wrong conversation well.

QuickCoach, then the *CEO Conversation Model*

QuickCoach — before and after

The leader's internal preparation. Never a script read at the person. Four minutes of thinking before a readiness conversation changes what the conversation is able to do.

- What outcome does **this person** need from this conversation?
- What am I assuming about their readiness that I have not tested?
- What is mine to own in the gap I'm about to name?
- **Afterward:** what did I learn about them that I didn't know?

CEO Model — during

The structure of the conversation itself. It keeps a developmental conversation from collapsing into an assessment delivered at someone.

- **Clarify** — the future role, the gap, the shared picture of both
- **Explore** — their experience of it; where they feel ready and where they don't
- **Own** — what they will do, in their words, with a date they set

MEANING BEFORE METHOD

The person must leave having made meaning of the gap — not having received a rating.

One-on-Ones and *Reflective Accountability*

07 · One-on-One Form

Where succession actually happens. An annual talent review decides nothing; the biweekly conversation develops someone. Add one standing line to the form and readiness stops being an event.

- One recurring prompt: **"Where are you on your growth focus?"**
- Name progress toward the future role when you see it
- Surface obstacles early — most stalled plans stall on access, not effort

08 · Reflective Accountability Form

Where experience becomes capability. A stretch assignment teaches nothing on its own. Reflection is what converts the experience into judgment the person can reuse.

- Completed by the employee after each milestone
- Three questions: what happened · what I own · what I'd do differently
- Feeds the **Feedback Loop** — the plan adjusts on evidence, not on the calendar

03

PART THREE

Running it as a *rhythm*.

Succession fails as an annual event and works as a cadence. The tools have a sequence.

One year, in *four moves*.

Annually

DEFINE & LOCATE

Competency Scope Canvas → **Self-Assessment** → **Gap Analysis**. Define the future role, gather the person's own account, and hold one honest conversation about the distance. Output: two to three priority gaps and one named mindset shift.

Quarterly

PLAN & STRETCH

Intentional Growth Plan. One focus, one developmental move, one visible milestone in 90 days. Written by the employee, coached by the leader, sponsored where access is required.

Biweekly

COACH & ADJUST

Dialogue Continuum → **QuickCoach** → **CEO Model** → **One-on-One**. Choose the conversation, prepare for it, hold it, and keep the growth focus on the standing agenda. This is where readiness is built.

After each milestone

REFLECT & CONVERT

Reflective Accountability Form → **Feedback Loop**. Convert the experience into capability, then adjust the plan on what the evidence shows rather than waiting for the next review.

ONE SYSTEM, ONE LIFECYCLE

The competency someone develops here becomes the focus of their first onboarding conversation in the new role. Succession hands off to Onboarding — not to a start date.

Readiness leaves *evidence*.

Behavioral signals

People are demonstrating behaviors of the next role before they hold it — facilitating, developing others, thinking across functions rather than within a task.

Conversation signals

Employees can describe their own growth focus without prompting. If they cannot name it, the plan exists in your file and nowhere else.

Capability signals

Internal candidates are competitive on merit. Roles are filled from within because people were developed, not because policy required it.

Trust signals

People raise their aspirations out loud. A person telling you they want a bigger role is evidence they believe the pathway is real.

Continuity signals

A departure is a transition, not a crisis. Someone can carry the work while the role is filled deliberately.

Resilience signals

The organization has more ready people than open roles — the definition of bench strength, and the point of the pillar.

Honest answers to the four real *objections*.

THE OBJECTION

THE HONEST ANSWER

"Won't naming a successor create expectations we can't honor?"

It would — which is why BRITER does not promise a role. You commit to **developing the person**, not to promoting them. Say that plainly and the expectation is accurate.

"If I develop them, they'll leave."

People leave when they cannot see a pathway far more often than when they can. Undeveloped people leave too; they just leave less capable.

"We don't have time for another process."

You are already spending the time — in backfills, in learning curves, in turnover. This adds one line to an existing one-on-one, not a new meeting.

"What if the gap conversation demoralizes them?"

Not knowing where you stand is more demoralizing than knowing. A gap named as information, with a plan attached, reads as investment.

This application, against the *system*.

CHECK	RESULT
Philosophy	Meaning before method — succession develops the person toward the role, not a chart of names. ✓
Standard	Readiness built through Recognition, Coaching, Feedback, Precise Praise, and Correction. ✓
Frameworks	Uses the Dialogue Continuum, QuickCoach, CEO Model, and Feedback Loop as they exist — none duplicated, none replaced. ✓
No new models	Every tool here is an existing BRITER instrument applied forward. No competing methodology introduced. ✓
Language	Ownership · Reflection · Growth · Identity · Trust · Resilience — consistent with the OS vocabulary. ✓
Integration	Hands off to Onboarding; draws targets from the Competency architecture; reports readiness through Mission & Metrics signals. ✓

**An organization does not become
resilient by *naming* who comes next.**

*It becomes resilient by developing them — one conversation at a time, long before it
needs them.*

