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# WHERE SUCCESSION PLANNING FAILS

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By Dennis Heath



## When a technical expert is promoted into a leadership role, things can go horribly wrong

I am often hired to coach someone who has moved from a technical role to one of leadership. When I use the term "technical" I mean in the broadest sense of a functional expert, whether it be in the field of technology, accounting, legal, sales or other specialised role. The call from the HR Department usually comes after the event, when things have started to go wrong.

So why do so many companies promote people into leadership roles who are unprepared for leading a team? Is it simply that there is no formal succession plan? Not at all. An individual may be earmarked for promotion for what on the surface appear good, logical reasons. He or she has received consistently good performance appraisals, feedback from colleagues is positive on their expertise in the job and they regularly meet or exceed their KPIs. All the right reasons for a well deserved promotion, one might think.

It seems quite logical to promote someone who is an expert in their field to head up a functional team. Surely a team with an expert at the head can only benefit from that wisdom and experience. The team will consider themselves lucky to have someone as their boss whose technical skills are highly regarded, won't they?

Functional experts have great trouble in delegating tasks they believe they could do better themselves. They may indeed delegate but then frustrate their team members by constantly dabbling in the delegated task and criticising the team's efforts.

Promotions of technical experts without proper preparation for the challenges of leadership often result in a demotivated team, lower performance, intra team conflicts and inter departmental tensions. The reason is simple, the individual has not recognised or been taught the difference between functional excellence and leadership. Functional excellence is usually measured by results evidenced by hard facts and data, e.g. an IT network that works first time, a set of accounts that are true and accurate, a contract that withstands close scrutiny or the achievement of a sales target. Leadership excellence is ultimately measured in the same way but the individual who has been used to achieving results through their own skills and ability suddenly has to achieve them through a medium that is unpredictable and sometimes fickle, i.e. other human beings.

Typical things that go wrong when a functional expert is thrust unprepared into a leadership position are:

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**Delegation:** Functional experts have great trouble in delegating tasks they believe they could do better themselves. They may indeed delegate but then frustrate their team members by constantly dabbling in the delegated task and criticising the team's efforts. If this pattern is left unchecked team members will not waste time trying to do their best if they know the boss will end up doing it for them anyway. Plus it serves to stifle the development and creativity of team members.

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**Strategic Vision:** Functional experts will often fail to see the bigger picture. They have spent their career focusing on one aspect of the business and may not have taken the trouble nor been encouraged to think about the organisation's wider vision and purpose. Worse still, because they continue to focus on the technical aspects of their field, they are unequipped to effectively communicate the organisation's vision and higher aspirations. If the team can't see where they are going or why, then how can we expect them to commit to the journey?

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**System Thinking:** Because they are not looking at the bigger picture and tend to be parochial in their view of their role and that of their team, they often fail to spot the impact of decisions and communications on other departments. Decisions and actions can sometimes be inwardly focused on their own team and the

protection of their functional territory. This can spark inter-departmental conflict and be the trigger point for energy sapping political battles.

**Communication:** In most leadership coaching assignments, communication skills, both verbal and written are often areas that need attention. In the case of a functional expert, especially if they are in a deeply technical field more used to dealing with numbers and data, the problem can be more pronounced. Issues range from communication style, sometimes abrupt and only enough to communicate essential facts and data, through to a complete EQ failure. Some just fail to recognise the need to create rapport with the team and other departments and worse still, do not acknowledge that team morale and motivation is their responsibility.

So how can organisations avoid falling into the trap of failed leadership promotions? First, recognise that a technical expert does not necessarily make a good leader. Second, if a succession plan is in place, start measuring high potentials in terms of leadership ability, not purely functional expertise and results. A training needs analysis must be done well in advance of promotion to prepare the individual to take on leadership responsibility. Such training is likely to include soft skills and self awareness exercises such as an MBTI assessment, coupled with professional coaching. But most of all there needs to be a mind-set change on the part of the aspiring leader from one of focus on details and data to one of focus on the team, their development and above all their motivation. Once that is achieved, positive results will come.



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