

Beyond the Leadership Pipeline: Rethinking Succession Planning for Critical & High Potential Talent

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VP People Strategy

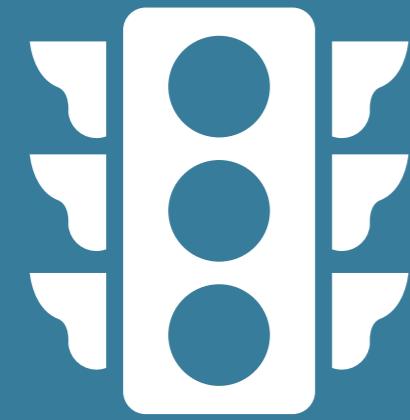


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TALENT PHILOSOPHY

AT THE LIFETIME HEALTHCARE COMPANIES, OUR TALENT PHILOSOPHY IS FOUNDED ON THE BELIEF THAT PEOPLE MAKE THE DIFFERENCE — AND THAT CREATING AN EXCEPTIONAL EMPLOYEE EXPERIENCE STARTS AT THE VERY FIRST INTERACTION.



Attract Exceptional Talent

We seek out exceptional, diverse individuals whose skills and values align with our mission and future, ensuring every candidate has a positive experience from first contact to hire



Create the Employee Experience

We create an environment where employees are deeply engaged, connected to our mission, and inspired to deliver high performance.



Empower Growth & Development

We invest in continuous learning, career growth, and leadership development so every employee can realize their full potential.

Succession Planning



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What is Succession Planning

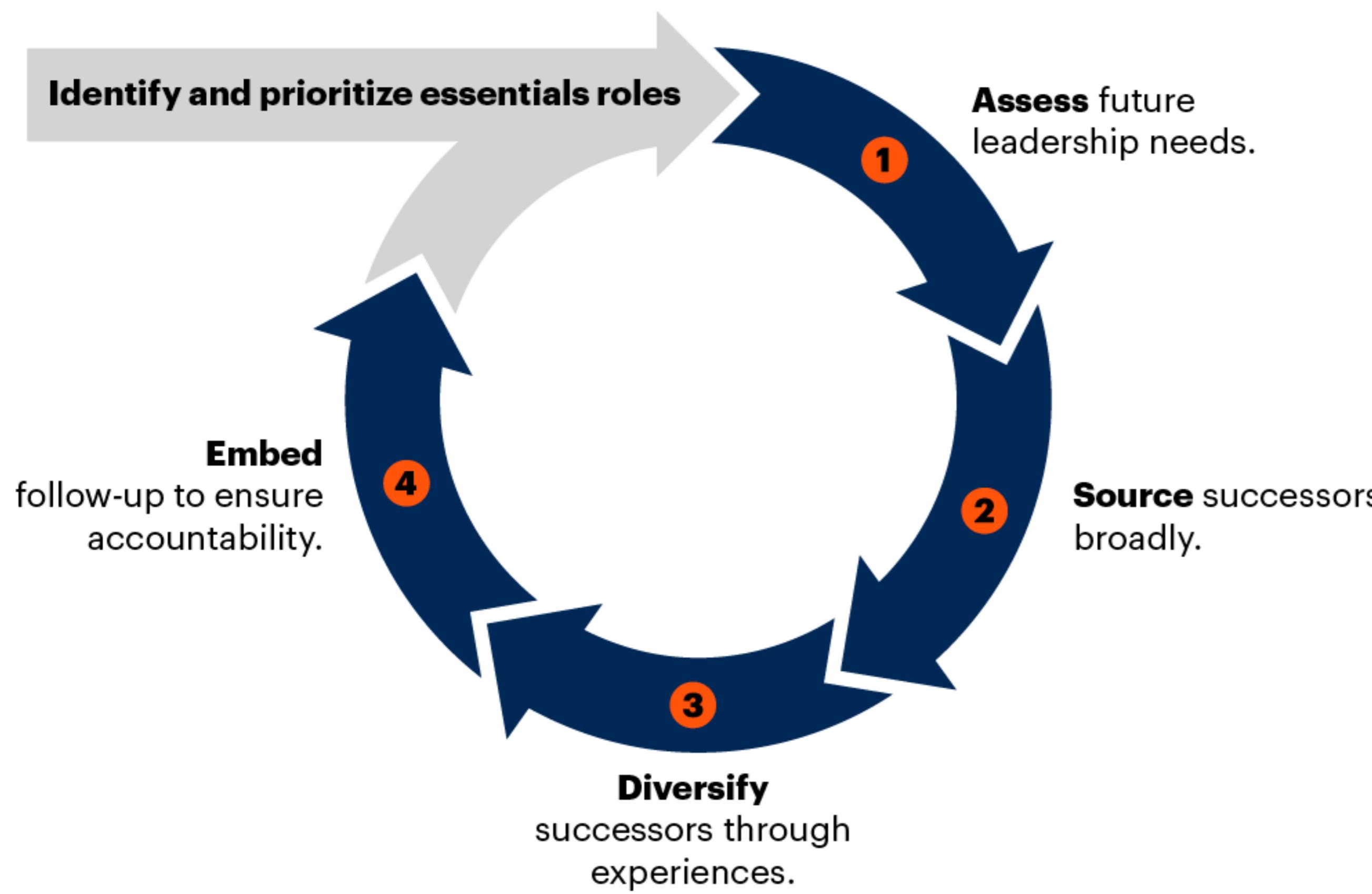
- A structured approach to **ensure continuity** in roles critical to success
- Identifies and prepares talent** to assume greater responsibility over time
- Balances **near-term readiness** and **long-term potential**
- Traditionally **anchored in leadership** continuity



Succession Planning Objectives



Traditional Succession Planning



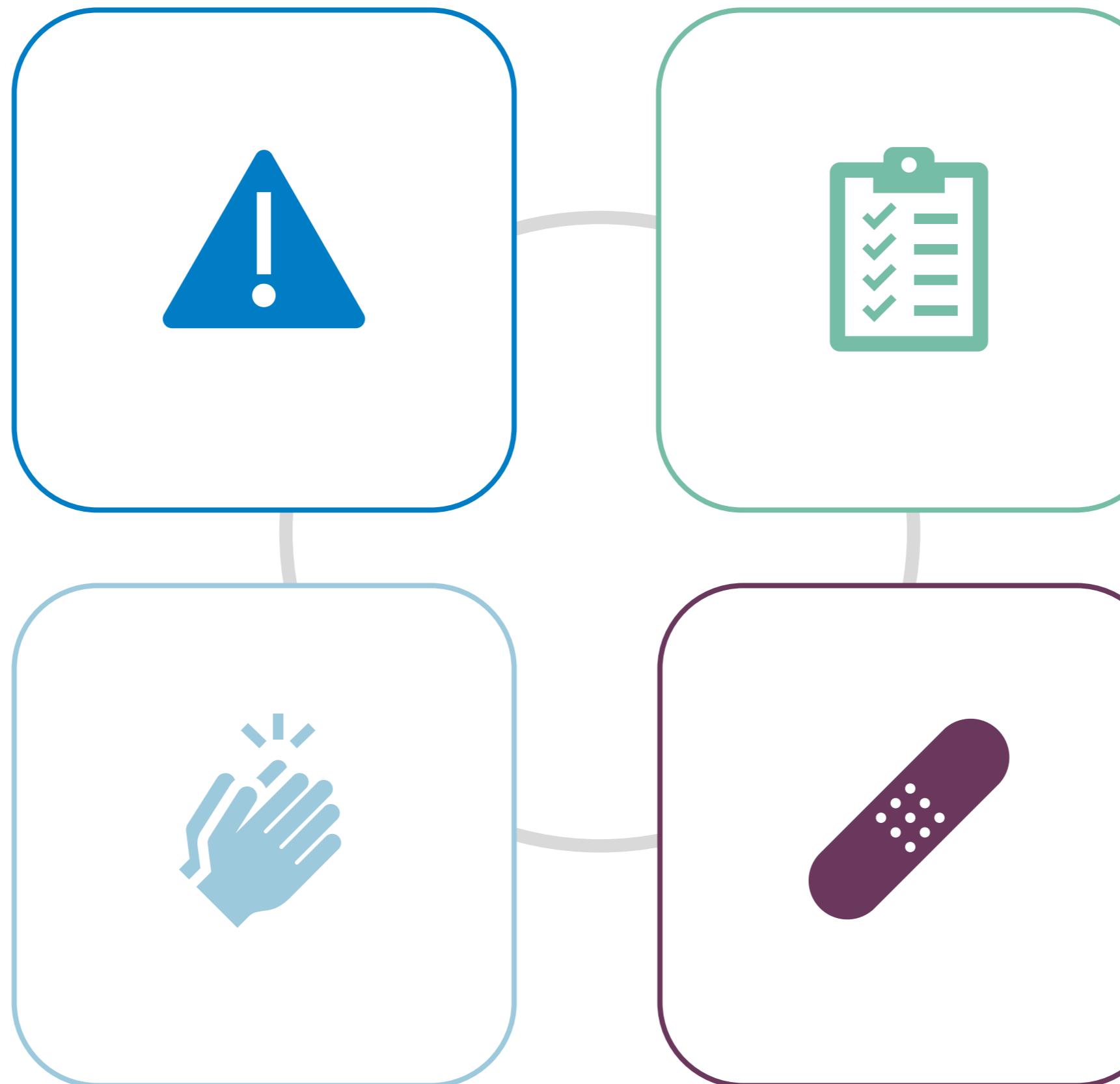
- 1 Executive & Senior Leadership Roles
- 2 Hierarchical Advancement & Promotions
- 3 Conducted Annually
- 4 Limited Visibility
- 5 Leadership Continuity Focused

Where Traditional Models Fall Short



Alignment

Critical non-leadership roles lack formal succession coverage



Engagement

High-impact contributors may disengage if leadership is the only growth path

Efficiency

Deep expertise and institutional knowledge remain concentrated

Innovation

Organizations are slower to adapt to changing skill demands

Why Succession Had to Evolve

Employee Expectations
Business Realities



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Employee Expectations

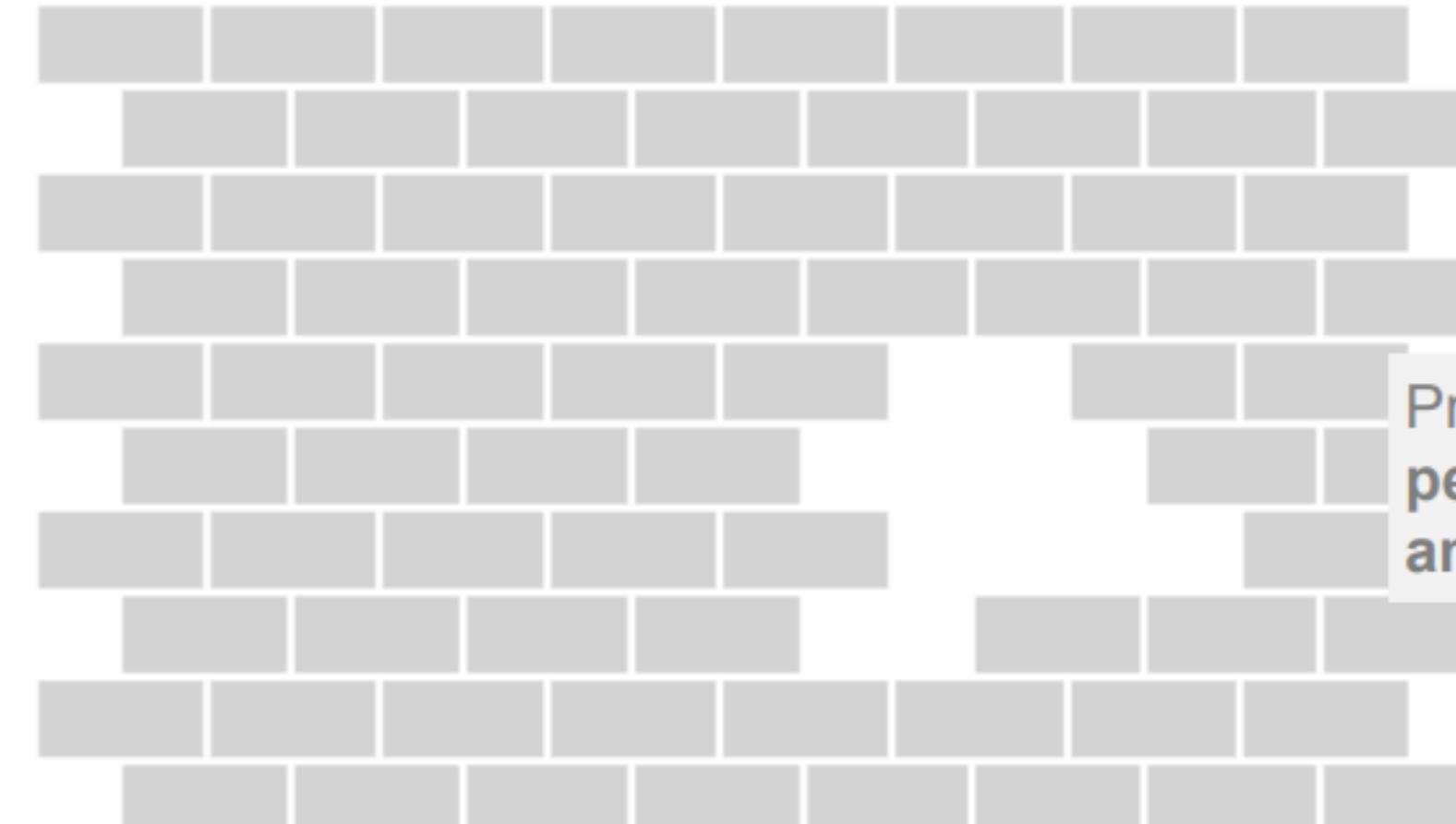
When will I be promoted?



Assumption

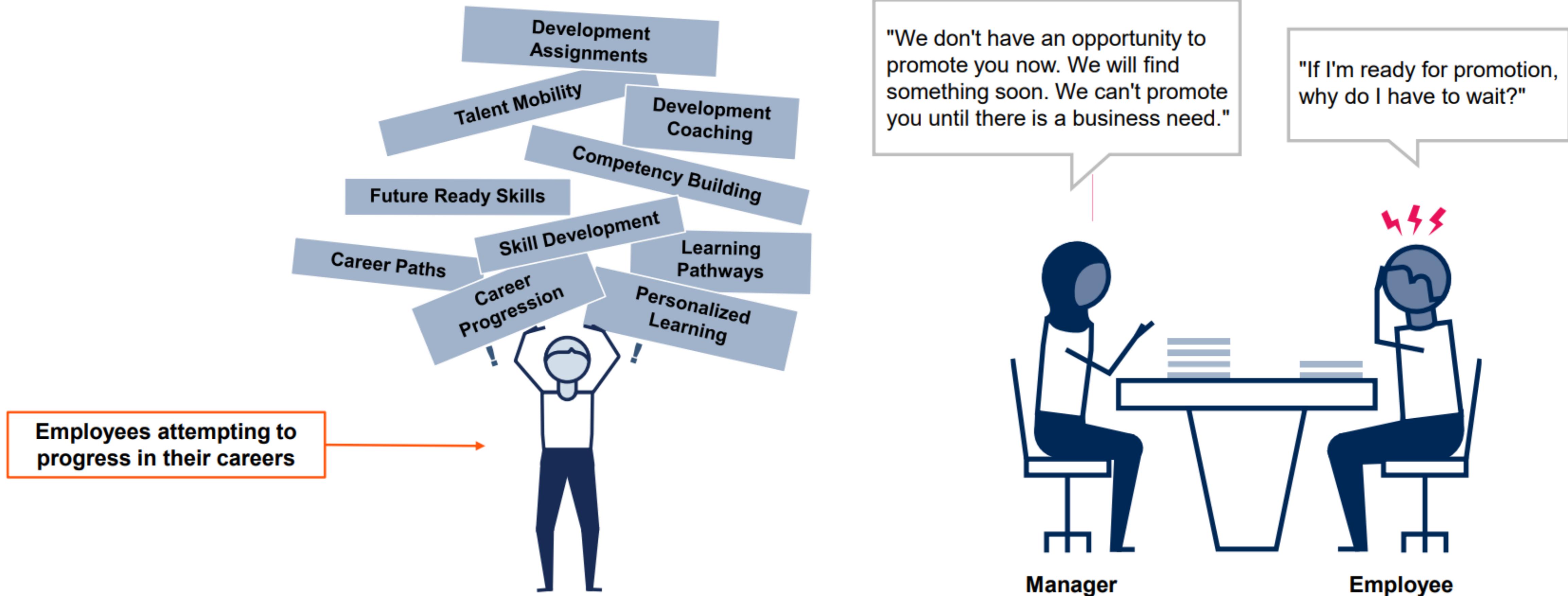
In 2 years

Reality



Promotions are based on
performance, aspiration
and role availability

The Employee Experience



The Business Reality



1

Increasing complexity and pace of change

Our business is evolving faster than traditional talent models were designed to support, requiring more adaptable ways to identify and grow capability.

2

Greater reliance on specialized and cross-functional expertise

We increasingly depend on deep expertise and collaboration across functions, not just movement up a leadership hierarchy.

3

Employees seeking growth without people leadership

Our employees are looking for meaningful growth and impact, even when leadership roles are not their desired path.

4

A need to build strength across the entire organization, not isolated roles

To remain resilient, we must develop broad capability and bench strength across roles—not just plan for isolated positions.

Evolving Our Definition of Succession



1 Leadership Succession Remains Essential

- Ensures **continuity** in roles critical to enterprise direction and decision-making
- Builds **readiness for key leadership transitions** and planned or unplanned departures
- Maintains **confidence, stability, and accountability** at the top of the organization

2 Expanding Beyond Leadership Pipeline

- Recognizes that critical **impact is created across many roles**—not only people leaders
- Preserves **deep expertise** and institutional knowledge in specialized and technical roles
- Creates **visible growth paths** for high-impact individual contributors

3 Focused on Sustaining Enterprise Capability (not just filling roles)

- Builds **bench strength broadly across teams, functions, and disciplines**
- Reduces risk by **avoiding over-reliance** on single individuals or roles
- Enables agility by **preparing talent to shift** as business needs evolve

How to Identify Talent



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How to Uncover Hidden Potential

Engagement & Discretionary Effort

Demonstrates strong commitment to our goals and values, **invests extra energy to drive results**, and actively looks for ways to improve outcomes for the team and organization.

Succession Connection

Signals sustained motivation and reliability needed to support long-term capability and continuity.



Ability / Performance
Consistently **delivers strong results in current responsibilities**, demonstrates the capacity to handle increased scope and complexity, and **learns quickly when faced with new challenges**.

Succession Connection

Indicates readiness to grow into broader or more critical roles as business needs evolve.

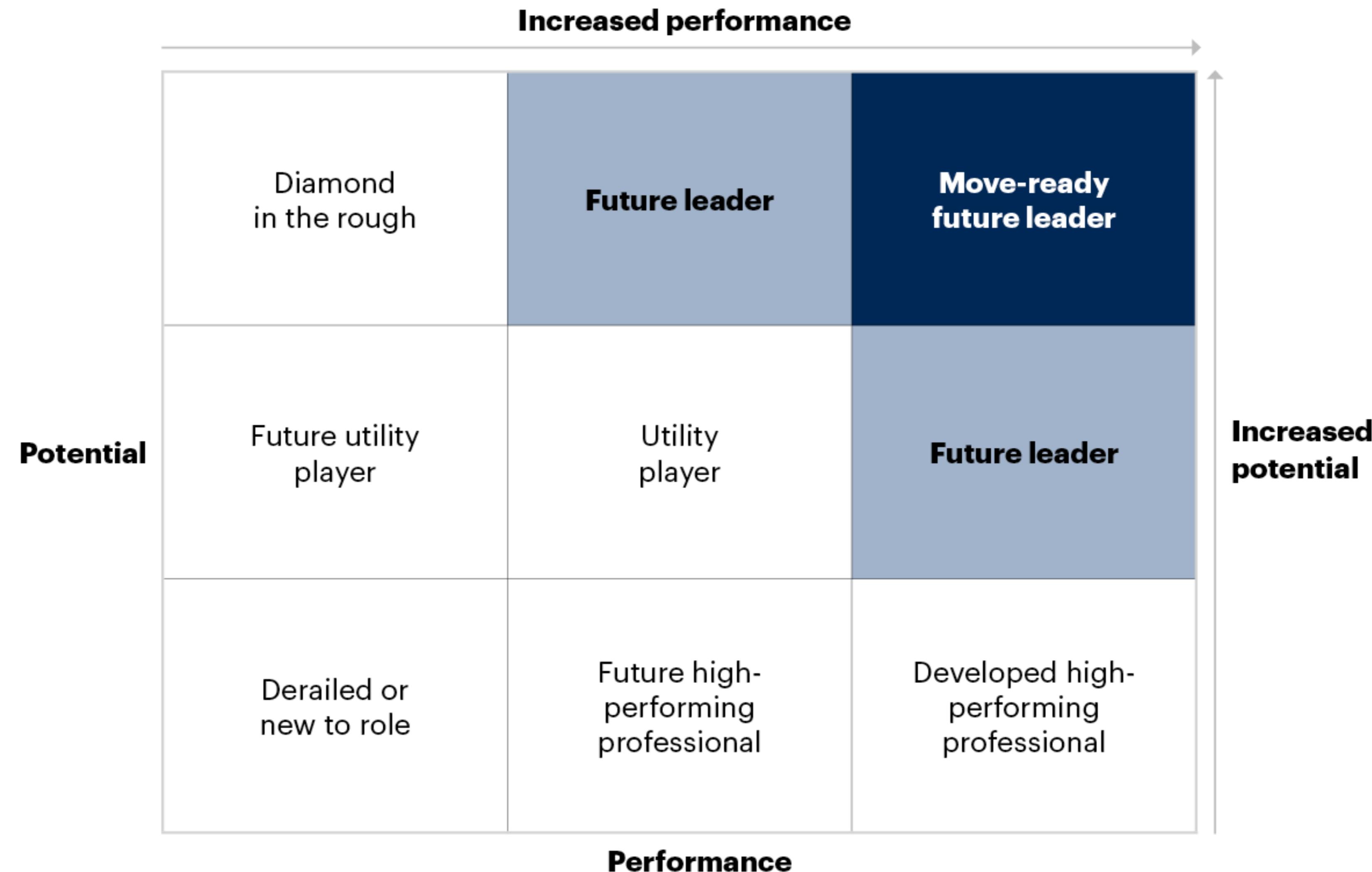
Aspiration

Shows a clear **desire to grow**, take on greater responsibility, and increase impact—through leadership, expanded expertise, or enterprise-critical contributions.

Succession Connection

Provides direction for targeted development and helps ensure alignment between future opportunities and individual intent.

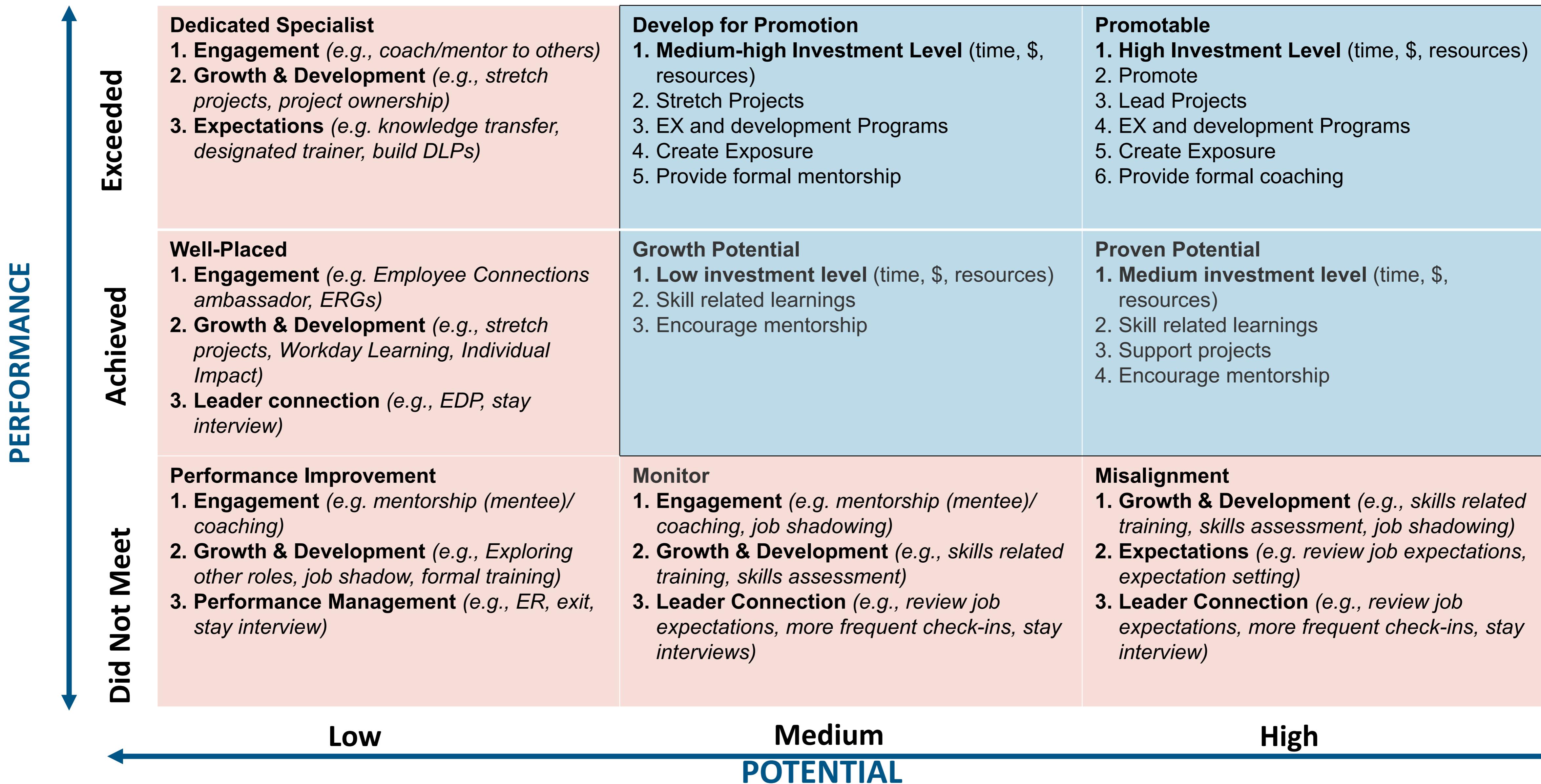
Classic 9-Box Approach



Thinking Inside the Box



Investing in Talent (Focus on the 4)



9 – Box Enables...

Evaluate Talent

Provides a clear visual representation of employee performance and potential

Succession Planning & Programs

Provides a pipeline of talent who can fill key roles

Identify High Potential Individuals

Helps identify who is ready for leadership or other key roles

Facilitate Open Dialogue

Framework for facilitating dialogue across leadership

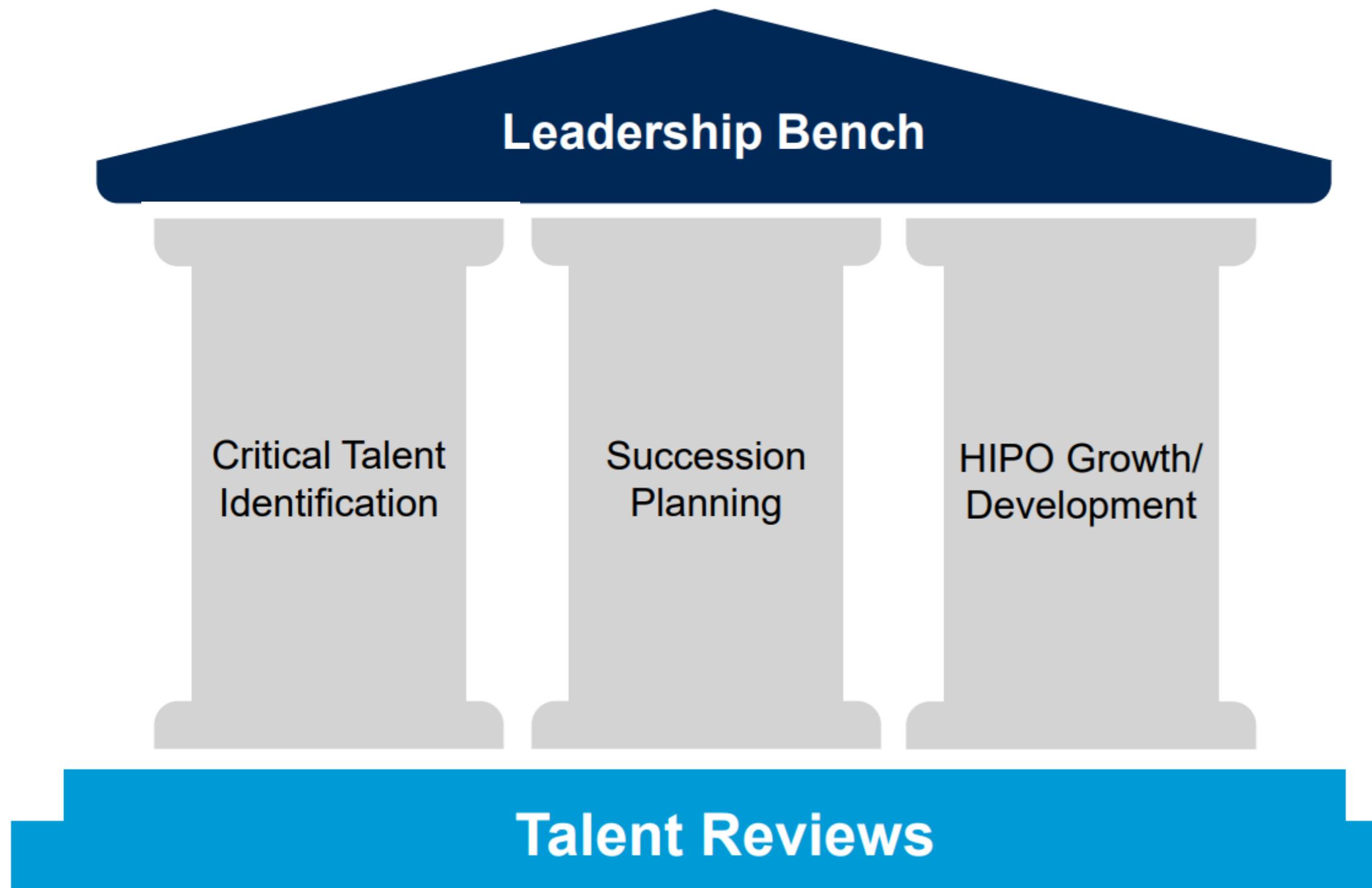
Develop Targeted Interventions

Groups employees based on their specific potential and needs

Inform Talent Management Decisions

Informed decisions: promotions, development and retention strategy

Talent Reviews – The Foundation



Talent reviews are structured **leadership conversations** that bring together performance, potential, and future readiness to develop a shared understanding of our talent and **how we invest in people** to meet evolving business needs.

The Value of Talent Reviews

Creates shared visibility

Establishes a consistent view of talent across leaders, reducing silos and single-manager bias while increasing enterprise awareness.

Identifies future capability and risk

Highlights critical roles, high-impact contributors, and areas where bench strength needs to be built or strengthened.

Enables targeted development investment

Aligns development actions to both individual potential and organizational priorities, ensuring resources are focused where they matter most.

Strengthens succession planning

Builds a sustainable pipeline of talent by linking today's performance and potential to tomorrow's business needs.

Drives better talent decisions

Informs promotions, mobility, development opportunities, and retention strategies with greater confidence and consistency.

Connecting Skills & Readiness



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Introducing Skills to Succession



Moving Beyond Leadership Competencies

From Assumptions to Evidence: Capabilities & Skills

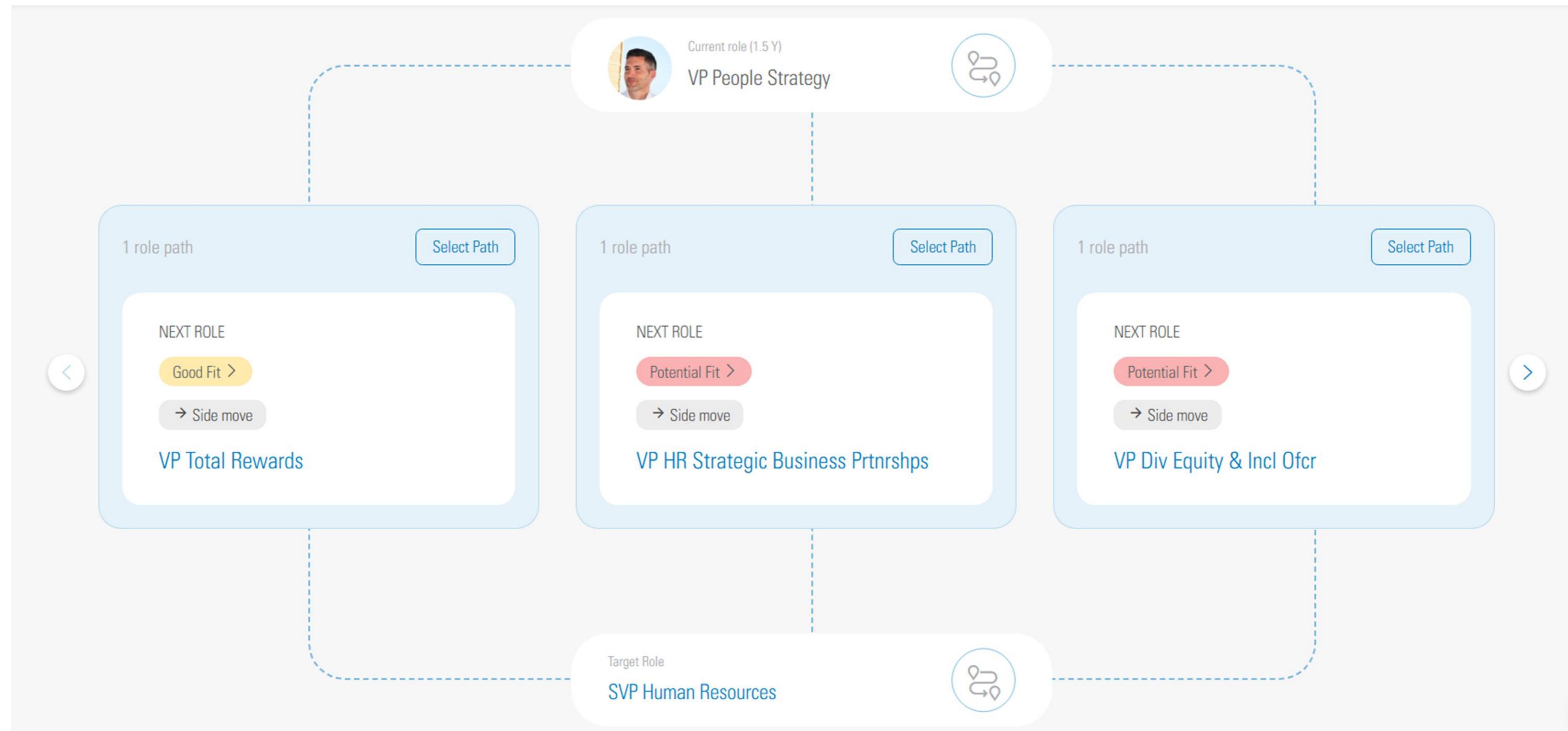
Potential alone is not readiness

Skills clarify:

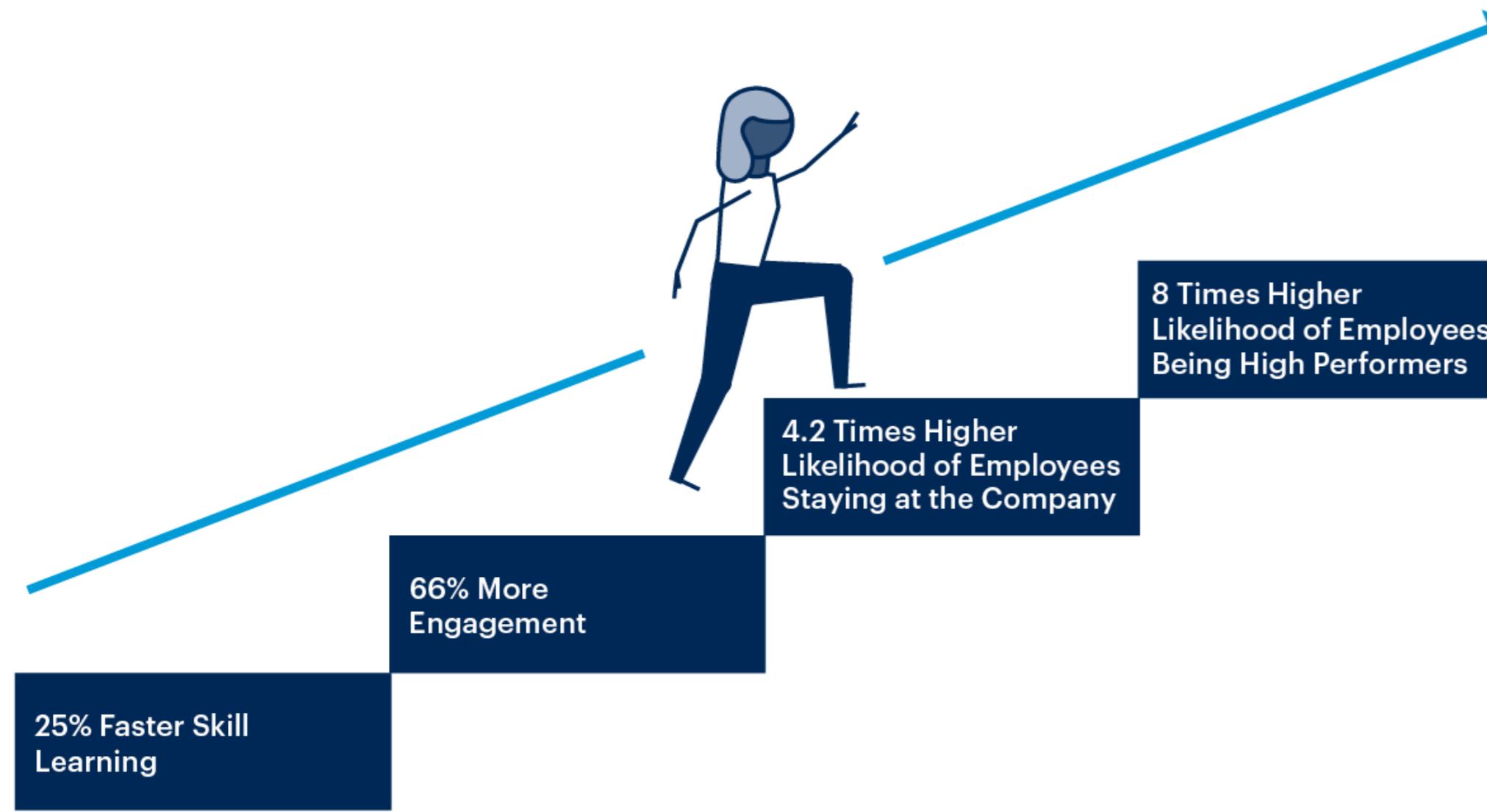
- What “ready” looks like
- What gaps must be closed

Enables intentional, efficient development planning

Begin with Career Pathing



Skills & Proficiency



How We Assess Skill Proficiency

A Practical, Scalable Approach

Skill expectations defined by:

- Role criticality
- Future business needs

Proficiency assessed using:

- Self-assessment
- Manager input & feedback
- Observable behaviors and outcomes

Focus on growth trajectory, not perfection

Skills → Development Planning

SKILLS GAP
14/20

Skills you need to become a SVP Human Resources

Executive Leadership (required level 4) [\(i\)](#)

Organizational Development (required level 5) [\(i\)](#)

Labor Relations (required level 5) [\(i\)](#)

Top mentors to help you become SVP Human Resources

Short-term career goals (0-2 years) Visible only to you [\(i\)](#)

Strategic Business Acumen and Influence

- Enroll in executive leadership programs (e.g., Harvard Business School's "Advanced Management Program").
- Lead cross-functional strategic initiatives beyond HR (e.g., M&A integration, business transformation).
- Partner with the CFO and COO to deepen financial acumen (e.g., budgeting, P&L management).

Long-term career goals (3-5 years) Visible only to you [\(i\)](#)

Enterprise-Wide Impact

- Drive a talent strategy aligned with enterprise goals, focusing on cross-functional integration.
- Co-lead succession planning and leadership development.
- Join task forces focused on organizational effectiveness, diversity, and inclusion.

Relationship Building and Influence

- Establish executive mentorship with a CHRO from another function.
- Enhance boardroom presence by presenting quarterly talent reviews.
- Build relationships with non-HR executives to collaborate on strategic initiatives.

Operational Mastery and People Analytics

- Gain proficiency in people analytics tools to drive data-driven decision-making.
- Oversee the full Workday implementation for talent, succession planning, and performance management.
- Develop a holistic dashboard for talent metrics (e.g., retention, diversity, and inclusion).

CHRO Readiness and Governance Expertise

- Participate in board governance.
- Gain experience in executive compensation strategies by collaborating with the compensation committee.
- Drive policy decisions on workforce strategy, AI in HR, and ethics in talent practices.

Coaching and Legacy Building

- Formalize an internal mentoring program to develop next-generation HR leaders.
- Implement a coaching culture program focused on senior leadership development.
- Create a succession plan for your VP role, identifying a strong internal pipeline.

AnnMarie MacCubbin
Benefits Administrator II
Rochester, New York, United States of America

[Request mentorship](#)

[Request mentorship](#)

[Request mentorship](#)

[Request mentorship](#)

Learning & Development

H i P o P r o g r a m s

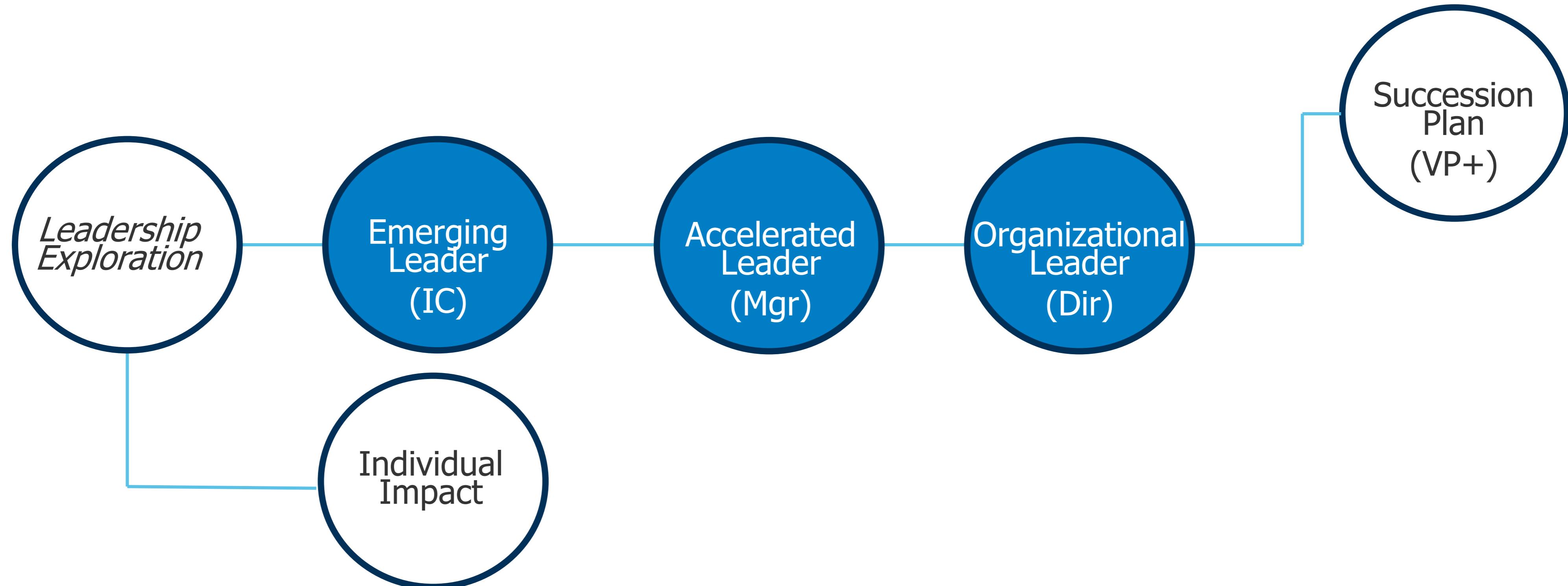
W o r k f o r c e E n a b l e m e n t



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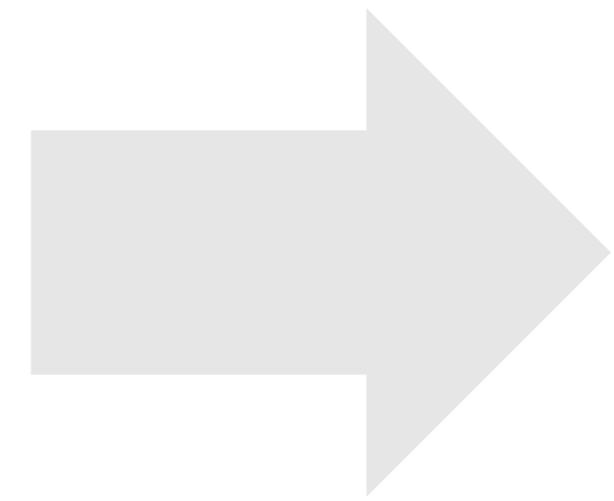
Career Paths & Programs Evolve



Individual Impact Program

Skills for Enterprise Impact

DiSC & self-awareness	Influence without authority
Emotional intelligence	Relationship building
Change management	Time management & prioritization
Effective communication	Innovation and problem-solving



Delivery

5 in-person sessions
Self-paced learning between sessions
Embedded mentorship throughout
Application-focused and experiential



70% Learning from Experience

20% Learning from Others

10% Formal Learning

The Internal Talent Marketplace



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Why an Internal Marketplace for Talent

Scaling Development Beyond Programs

Formal programs reach a limited population

Organizations need mechanisms to:

- Elevate talent broadly
- Close skills gaps continuously

Marketplace creates visibility and access

Connecting Talent to Opportunity

Talent profiles and skills

Career paths (leadership & non-leadership)

Learning aligned to skill gaps

Mentorship and coaching

Projects and stretch opportunities

From Selective Development to Enterprise Capability

Employees own growth

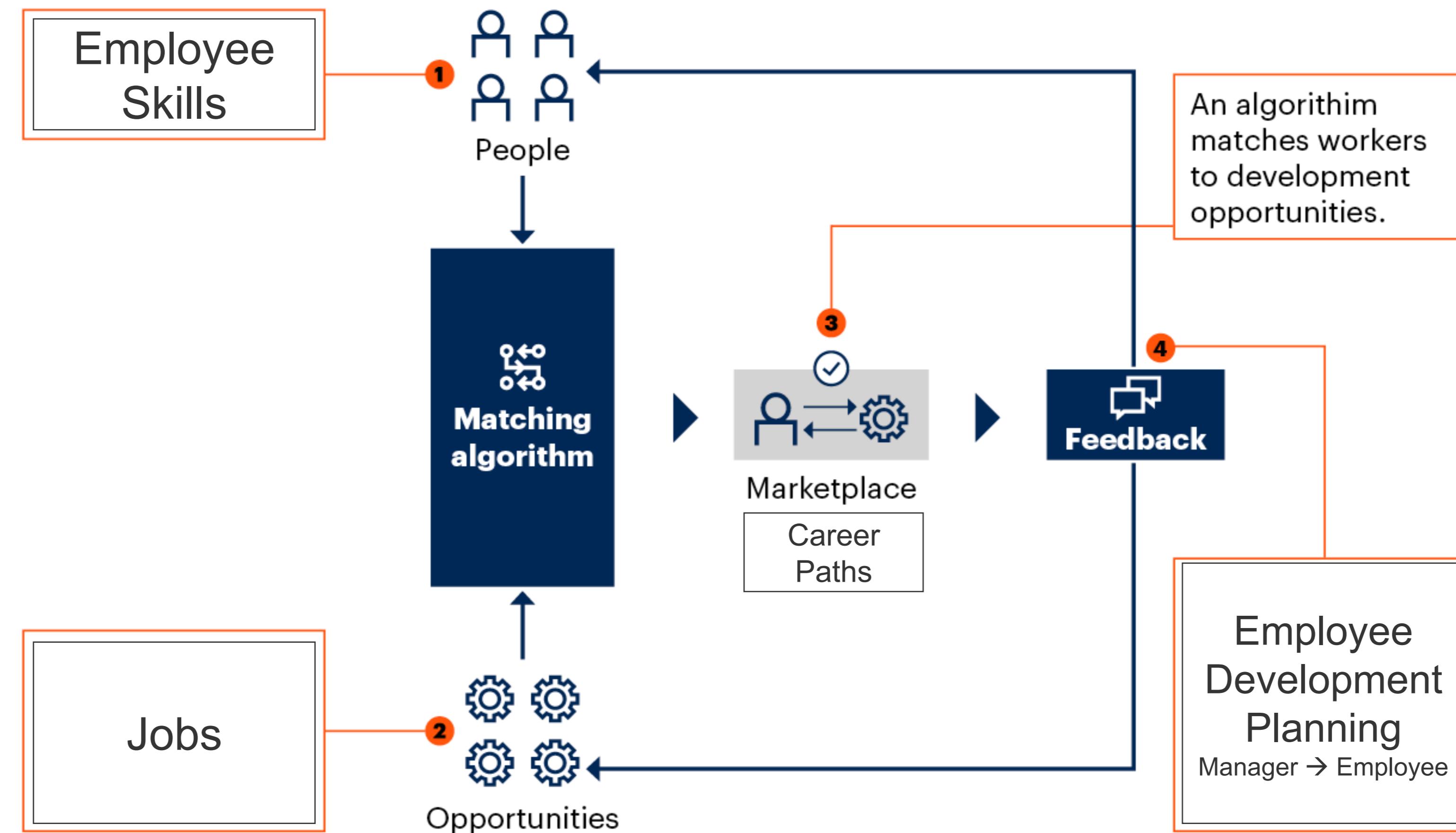
Managers access broader talent pools

Skills gaps addressed proactively

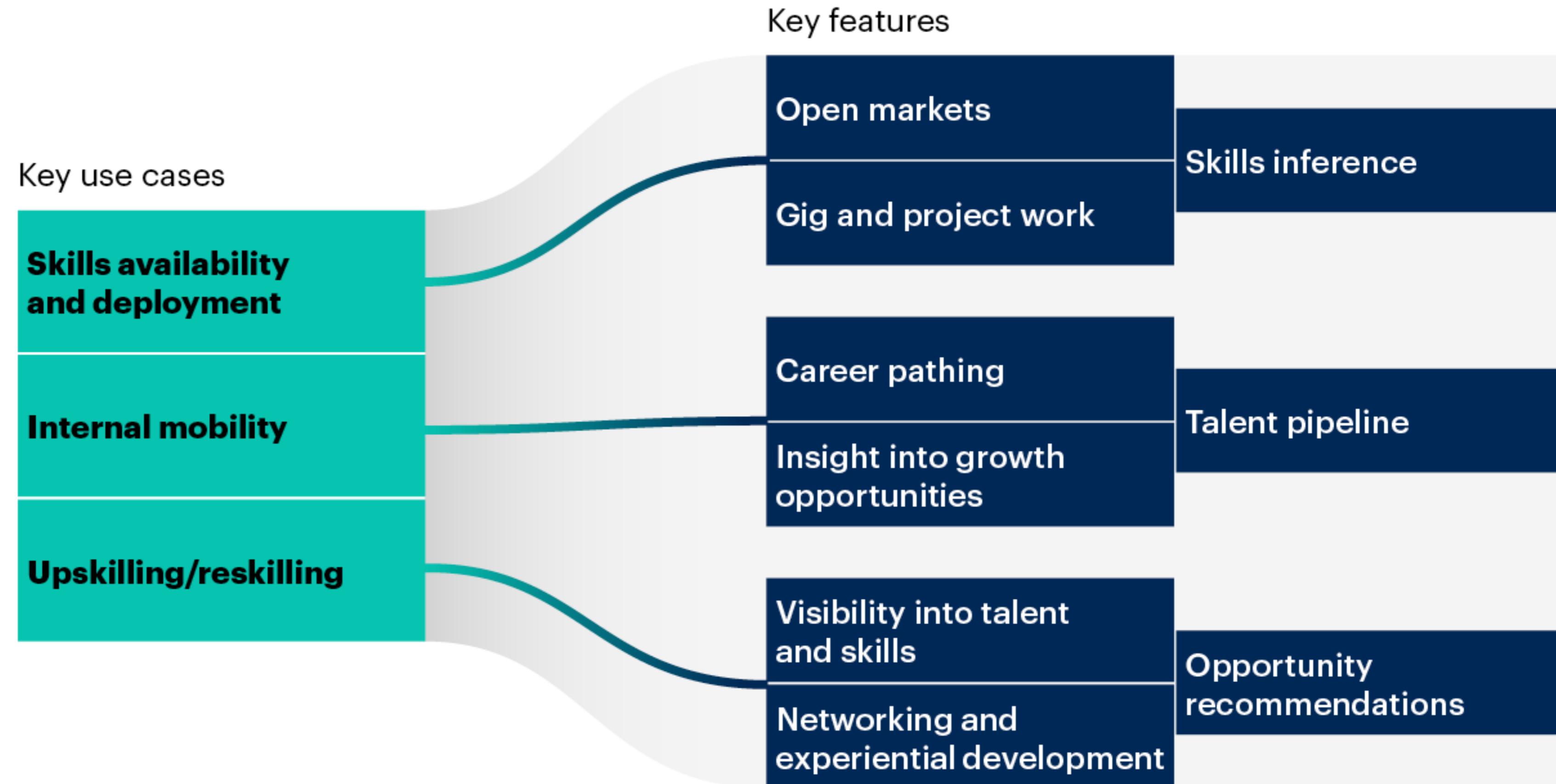
Development becomes inclusive, continuous, and scalable

What is a Talent Marketplace

Internal Talent Marketplace Process



How it Elevates Talent



The Talent Ecosystem for Growth



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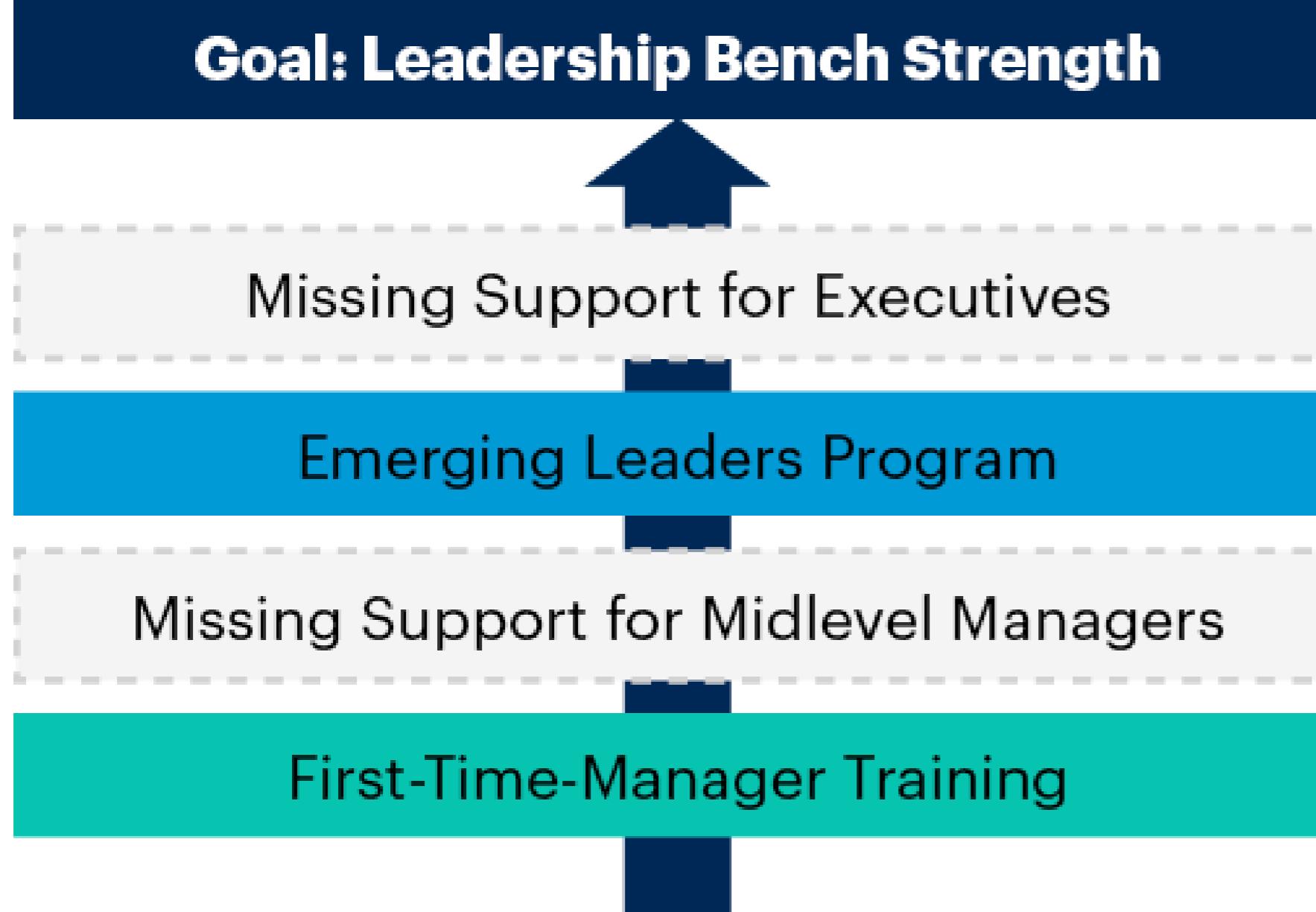
The Talent Ecosystem

Today:

Patchwork of static programs serving a limited population, primarily facilitated by L&D or vendors

Tomorrow:

Ecosystem of supports serving all employees, primarily facilitated by leaders, managers and employees



Keeping it Simple for Leaders



Q1

Set Performance Expectations

Establishing clear, measurable performance expectations and behaviors that align individual contributions with organizational priorities

Q2

Assess Potential

Evaluating an individual's capacity to grow into broader or more complex roles and target development for future readiness

Q3

Development Planning

supporting an employee's growth through targeted experiences, feedback, and learning opportunities that build readiness and skill attainment

Q4

Performance Appraisals

Evaluation of results and behaviors reflecting how effectively an individual meets expectations and contributes to team and enterprise success

Small & Mid- Sized Business Application



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Applying These Principles at Any Scale



Identify Critical Roles

- Focus on roles where loss would materially disrupt operations or service
- Look beyond leadership titles to where expertise and relationships reside
- Prioritize roles with deep institutional or technical knowledge
- Target risk reduction rather than enterprise-wide assessment
- Concentrate effort where dependency and exposure are highest

Practical examples

- Identify roles that would be difficult to backfill within 60–90 days
- Map “single-point-of-failure” positions
- Assign a secondary or “shadow” contributor for knowledge transfer

Discuss Performance & Potential

- Rely on shared leadership conversations, not ratings or tools
- Balance current contribution with future readiness
- Create alignment across leaders and reduces bias
- Focus on insight and action over documentation
- Treat talent discussion as ongoing, not annual

Practical examples

- Add a short talent discussion to existing leadership meetings
- Ask: “Ready now?”, “Ready with development?”, “Where is risk growing?”
- Capture follow-up actions rather than formal assessments

Define Future-Ready Skills

- Identify capabilities critical for success over the next 1–3 years
- Keep the skill set intentionally small and business-driven
- Apply to both leadership and individual contributor roles
- Guide development without heavy frameworks
- Anchor growth to real business needs

Practical examples

- Select 4–6 priority skills relevant to future work
- Use skills to shape stretch assignments and mentoring
- Align learning choices to these capabilities

Create Visible Growth Paths

- Expand growth beyond promotions or people leadership
- Use experience and exposure as primary development tools
- Make opportunities visible and accessible across teams
- Encourage shared ownership of development
- Build capability while sustaining engagement and retention

Practical examples

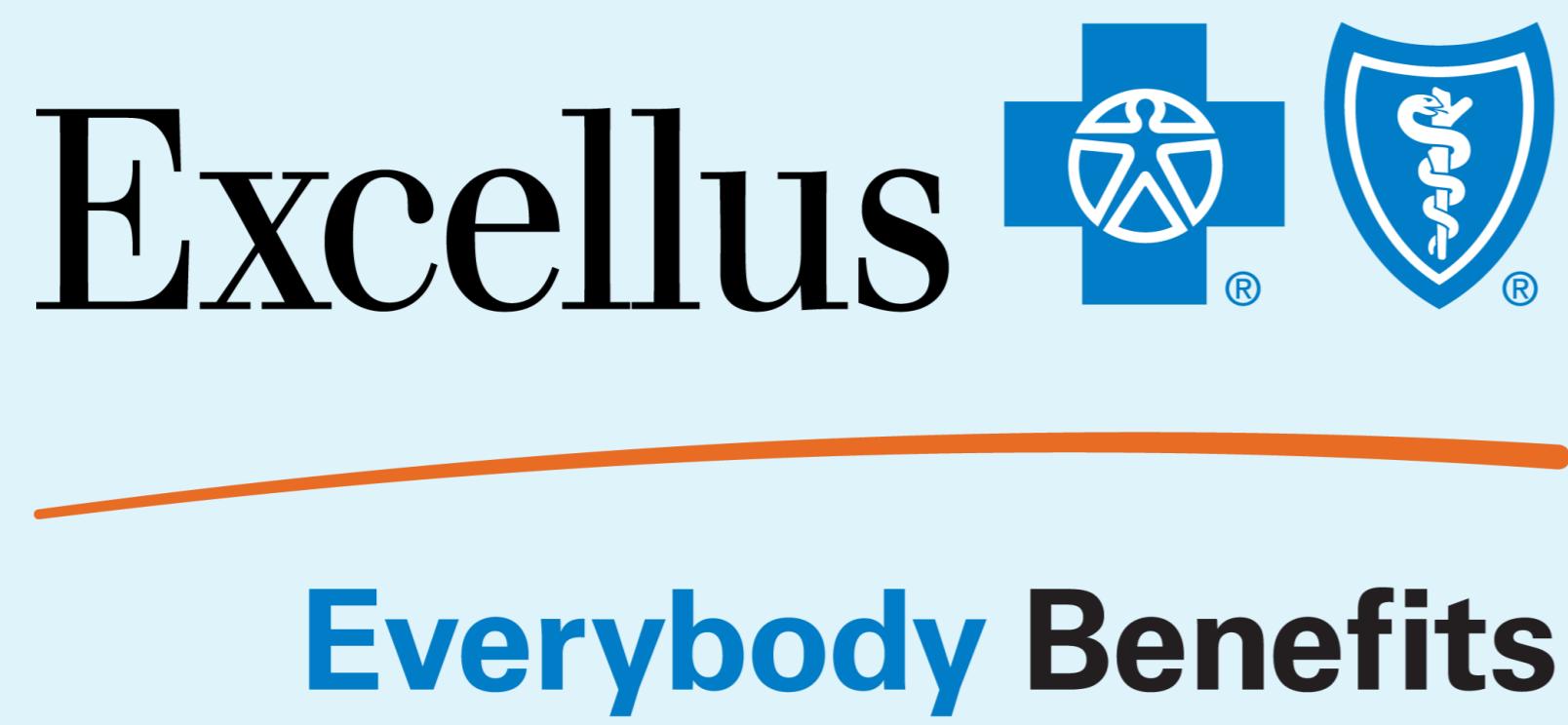
- Assign project leadership without changing titles
- Rotate ownership of key initiatives or processes
- Pair experienced contributors with emerging talent

Succession Planning Is a Growth Strategy

1. Leadership pipelines matter
2. Individual impact matters equally
3. Skills, visibility, and development drive resilience
4. Organizations that broaden succession planning sustain success
5. Improved talent outcomes: Employer Brand, Engagement & Retention
6. Future proof your workforce to remain competitive

Questions?





Thank you!