

HR Mixtape podcast | Hosted by Dr. Shari Simpson | Guest: Megan Leasher, Founder, Disruptive Journeys

Announcer: You're listening to the HR Mixtape, a podcast for leaders who want to understand people, strengthen culture, and navigate change with clarity. Today's conversation starts now.

Dr. Shari Simpson: Joining me today is Megan Leasher, founder of Disruptive Journeys. Megan helps organizations strengthen leadership pipelines and create more intentional succession and development strategies. Megan, thank you so much for jumping on the podcast with me today.

Megan Leasher: Thanks for having me, Shari.

Dr. Shari Simpson: So I love this topic and our listeners probably hear me say that a lot on the podcast. But, you know, we're going to talk about succession planning today. And I feel like this is one of those things that always ends up in like a fire drill moment, right? Like, oh my gosh, you know, somebody is leaving and we don't have a plan. What made you kind of more passionate to think about approaching this and helping people, you know, really fix this view of succession planning so it isn't such a fire drill for everybody?

Megan Leasher: Yeah, I, you know, Shari, I love that question because it absolutely was a moment for me. I was working with a president of a company. She was pregnant. It was high risk and she could not bring herself to have a conversation about maternity leave plans, just for basic continuity sort of things. Something that was planned and temporary and, you know, in the grand scheme of succession, certainly a lighter type of take, but that palpable, visible fear on her face of giving up control while she was on maternity leave was kind of everything I needed to know in the moment. And this isn't anything in particular about her, but it's just, it's so scary because people are giving up control. They're turning over something that is dear to their hearts, that is dear to their skill sets. It's how they add value. And people get uncomfortable because it's very scary to think about and actively talk about giving up control. And that was kind of my moment where I was just

like, this needs to be a normal conversation. Like, the more we talk about it, the less scary it becomes.

Dr. Shari Simpson: I love that and I think there's a designation between succession planning and replacement planning. Why do you think that, you know, I believe that, why do you think that designation matters though when we're having these conversations?

Megan Leasher: I think that designation is everything. And replacement is who is filling the seat. And it's a very specific chair. You know, only certain sorts of people with certain backgrounds and skill sets and certifications or whatever can sit in that chair and be successful. But succession planning is about who is on a bench, and we're sharing a bench, and we are collectively the team that is going to jump up, tap out, switch back and forth, think of a basketball game. Collectively, we're the ones getting it done, and who's on the bench is taking that organization into the future. So there's, for me, there's some interchangeability. So somebody who has a line position switches out and does a role in finance for a little while or in HR or another shared services for a while. Those type of roles where you're giving someone different like lateral assignments because maybe their COO potential. Those kind of people. That succession planning to me, it is about that bench that that core team blends out their skill sets, balances each other out in each moment to take that organization into future success.

Dr. Shari Simpson: The basketball bench analogy is so good because it takes you out of that mindset of succession planning lives on a spreadsheet or it lives in a system and we need systems for that kind of stuff. Obviously, you know, a huge proponent of systems when it comes to succession planning. But that analogy of thinking about it differently is really developing those different skills so you can have people that can step in and do different things. And that aligns with, you know, all the conversations we're having right now in the industry around skills-based hiring and skills development and that kind of stuff. So, you know, how do we really change our mindset around this? And I guess I'll ask this question in two different ways or with two caveats, is often I have seen succession planning be directly linked to your hypos, right? And it's

usually specifically related to people in higher level leadership positions. So we're only going to do succession planning for VPs and above or directors and above. I think that potentially can miss the mark of what true succession planning can look like. What's your perspective on that?

Megan Leasher: Yeah. You know, I think when organizations take like the VP and above approach or a C minus two or, or however, you know, whatever they call it, they're inherently saying that these are the important jobs. These are the jobs that we should be caring about. The continuity, the success, the future, all those sorts of things. And these are the critical jobs. I think that's what they're inherently saying by drawing a line. And, you know, in organizations, it's easier to draw a line and communicate, here's the line. If you're above, you're in. If you're below, you're not part of the process. There is a simplicity to execution in that. However, I think it is so missing the mark in skills and value and impact. Because for me, succession planning is about identifying those critical roles that if someone is suddenly gone, something breaks. Value is not delivered. Shareholders do not receive their value. Internal and external customers don't get what they have paid and signed up for. There is something inherently that breaks and is not delivered when those roles no longer exist. So if you think for an example of healthcare, you would have your critical, you know, medicine leaders, nursing leaders, different type of clinicians. But what about new business development? You know, that is a position that standardly in, you know, whatever you might call it or however it's framed. In a healthcare system, that would probably not be the type of role to automatically be targeted for succession planning. But as, you know, changes happen in administration and law that greatly impacts the influx of revenue, insurance funding, payouts, all of those sorts of things, suddenly that role is very critical to adding value. So I think the most important piece is what roles are adding that true value or said another way, what roles have empty break us, truly, truly break us. However, when you go into that space, you add precision, but you also add complexity and challenges and communicating, well, why this role and not this one? And my role is important and this one's not as much, you kind of get into some turf war things. as far as communicating the added complexity. So there's a trade-off. I get drawing that hard line, but I definitely think it misses a lot of key roles in organizations.

Dr. Shari Simpson: How do you start to identify those critical roles? Because I think we're good at identifying, you know, when you think about workforce planning, right, you're good at identifying what are the skills we have now, what are the skills we need in the future, what is our gap, and how do we get there, right? That's kind of table stakes in a lot of conversations. We aren't having the conversation, though, about maybe who knows where all the skeletons are buried, and if we lose that person, what's going to happen? Or, you know, maybe this one person has a very specific role that, while they might not be a high-paying, high-compensated leadership role, they're still critical to our organization. What does that practically look like? And if you're a smaller organization, this is probably easier, but, you know, I'm thinking about this. You know, you're big organizations. How do you even begin to tackle this?

Megan Leasher: I advocate for a committee type of action committee approach. And so quite often in succession planning, it's done very siloed and very vertical, where the incumbent is asked, who's your backup? You know, one, two, and three. Okay, we're good. It's on paper. We're done, right? And there's a lot of fallacies in that, but I bring that up because you're saying that the incumbent is the sole point of view and the sole point of truth for this type of thing. I think it's really important to have a cross-functional and cross-level committee that serves, especially in larger organizations, and maybe it's like a two-year term type of thing, stretch assignment with, you know, rolling overlaps. But that committee serves to both nominate and have consistent criteria for which people can identify roles in the organizations that truly are of value. That one person that's buried on a team that's the only person that knows how to do this one thing or the only person that has worked with this vendor for 15 years and knows how to make this one technology that we should probably get rid of but we still need it right now kind of work sort of rules. You have to go down. in terms of levels of who you're talking to. By just looking at your top leaders and having them look straight down, you're missing all kinds of opportunities for those critical people to be known and be seen.

Dr. Shari Simpson: And involving peers in that committee, it's such a good call out because we've talked about this before when it comes to things like

recognition, right? Like that view of top-down recognition. It feels good, but it doesn't necessarily feel as good as getting that recognition from that peer who knows. You know, maybe they've gotten the team's message on the side about your frustration or you're balancing your life, and it just, it has a different perspective. And often, you know, your peers know who's actually showing up and who's playing the game, right? Those are different things. He's doing the work. How have you coached leaders to maybe take a step back from, like you said at the very beginning, and I don't mean this in a bad way, but ego, secrecy, turf wars, that kind of stuff, because I think that that probably comes from a good place of high ownership, but we have to let some of that go to have those talent conversations.

Megan Leasher: Yeah, you know, there's so many things that come to mind here. The number one thing for me is to prescribe common language for how we talk about it and make sure that whatever approach we have, we're talking about it regularly in a way that helps make it less scary. So, you know, there's an aspect of succession planning that I feel like almost gets into morbidity. Like, we don't want to talk about it because it means we're gone. And that's not the case. And so how we give common language to it, how we say what does each conversation look like? You know, I know in most organizations, it's just, hey, look at your bench, is it still the same people? Great, check the box, we're good, we did our quarterly update. Like, no, I think a conversation should include, hey, where are all the files for the five biggest things I do in my job? Who are the key vendors for the 10 most important things I do in my job? Who are the contacts internally and externally that are partners, stakeholders, whomever, for the biggest aspects of my job? You know, those could be really healthy, regular, informative conversations that a whole team could honestly be a part of, but inherently it could be helping with even emergency succession. Like, where's my files? Who's my people? You know, what's the biggest fire? What does the calendar of my year look like? You know, there's so many things that we could be sharing on a regular basis that's day in the life of that could really be helping in those sorts of things. And inherently, that is part of succession planning. You're creating awareness to what's being done, what value is being added, what's my role as an individual incumbent in this situation. And it's also, you know, squashing maybe some curiosities or some mysteries about jobs too.

Dr. Shari Simpson: Normalizing that kind of conversation is definitely so important. There are so many areas of our business that, you know, if we just had the conversations more regularly, they wouldn't be scary. How do you separate this work between what HR really should be driving and responsible for and what business leaders should be responsible for?

Megan Leasher: Yeah, I see HR as the designer who is the ghostwriter who hides. And I'm not advocating we don't have pride for the work we're doing, but leaders 100% have to own this. They have to be the face of it. They have to be the speaker of it. And, you know, I don't care if HR built the best thing

ever, leaders have to be the ones doing all the talking and let HR take the back seat to be the SMEs when the leaders have the questions. And, you know, maybe the operational meetings behind the scenes involve HR helping, you know, to move the approaches forward, you know, in a consistent and quality-driven manner. But it 100% has to be those leaders. They own developing the people. They own moving the business forward. Everything falls on them in terms of the delivery of the work for themselves and their teams. It has to be them who owns it.

Dr. Shari Simpson: Yeah, that makes a lot of sense. How do you work with an employee who maybe you've identified, right? Like, hey, I think that they are my natural successor. They might be your right-hand person. But then when you go and talk to them, they're like, nah, fam, I'm good. I'd rather not, you know, like, because that happens, you know, so what do you do in that moment?

Megan Leasher: Yeah, you know, first of all, I'm going to be happy in that moment, because I asked the question of the person, because I think that's one of the biggest failures in modern day succession planning is that we don't bother to ask the successor, hey, do you want my job someday? So first of all, I'm going to be proud of myself that I asked the question and then I'm going to say, what do you want to do? And if that person says, I'm really happy doing exactly this and I want to be awesome at doing exactly this, then we talk about how to make that happen. and what a career would look like in that regard. If they want to learn something different, I would want to help them open up that door. Maybe it's an introduction to something else they might be able to do, someone they could meet, something they could learn. But I see myself as a leader helping to open up that door.

Dr. Shari Simpson: Well, and it gives you the opportunity also to have a conversation with that employee about preparing somebody else for that role. Yes. Because you've identified them and say, hey, you know, the way you show up, the way you do the work, your skill set that you have is what we think is needed. We don't see anybody else but you right now. So, you know, I think that it could be a very eye-opening conversation, but also maybe even

giving that person that kind of training development responsibility would feel very fulfilling for them. Maybe it wouldn't, right? That's also a possibility, but you don't know.

Megan Leasher: Yeah, and you know, it's really interesting because I see a situation of an emergency successor and a full placement successor as two different decisions which may or may not be the same person. So maybe that person I'm talking to in that moment, you know, if something happened to me, maybe they would be willing to step in, keep the ship moving as an emergency. But they're like, No, this isn't my long term jam. You know, I'll, I'll help you. I'll help you cover that, you know, cover the gap. But beyond that, no, I'm not it. So I'm hearing two great places, you know, two great pieces of information. One, if I get hit by a bus tomorrow, our work continues to move forward. I've got that person. They said they're willing to do it. But then also, I do need a longer-term successor, and perhaps I misjudged that person to be both. And I think a lot of times we do make that judgment that if there's interest, it is for both. And that's not always the case, and we need to ask.

Dr. Shari Simpson: Yeah, for sure. How do we keep this process fair and equitable and not introduce bias to it? And I don't even mean that from a perspective of we're doing it intentionally, right? There's halo bias. There's recency bias. There's things that are just human nature bias that, you know, we just have to be aware of. How can we try to develop this as HR is kind of building the program, right, the framework to pull some of that out or to put guardrails in place for it?

Megan Leasher: Yeah. You know, I mentioned earlier about a committee-based approach, cross-functional, different levels. And by approaching it with that point of view, you're inherently going to have a ton of people who have no idea who these potential successors are, which honestly, I think, adds a lot of beauty and objectivity to it. So, when we're taking a look at data, those individuals who don't know these people can look at that data without personal bias, opinions. They're literally just looking at a profile of data. You know, in a larger organization, that's certainly possible. So removing knowledge of people and therefore opinions from some of the decision

makers, which sounds a little scary to say that as a sentence, but if you have a consistent and rigorous evaluation approach that involves data, then you should be able to make those determinations whether or not you know the person. And so by balancing those points of views of patterns, not opinions into it, I think it definitely helps having that consistent approach in regards to here's how we have the conversations, here's what we talk about, here's what we get into versus the don't go here list. You know, having all of that information laid out and ensuring that our leaders who are having those conversations are trained to all of that can certainly work to minimize the impact of biases as much as possible.

Dr. Shari Simpson: Yeah, that makes a lot of sense. You know, as we wrap up our conversation, what's one question that you think those that are in leadership positions listening right now can go back and ask their teams this week to start this process of thinking about maybe succession planning a little bit differently than they have before?

Megan Leasher: I think a leader could go to their team and say, who do we quietly rely on all the time? is a really big question because it's not presuming a level, it's not presuming an activity, it's calling out a true dependency, a need, a value, someone who's driving impact, whatever that might look like for your organization. And by asking that question, it could be somebody who's an individual contributor who's three years in. It could be a vice president with 20 years tenure. That question has no levels to the answer. And so who are we quietly relying on? so much that if they were gone, we would freak out. And there's so many ways you can interpret and answer that question, but it's getting at the heart of who drives value in the organization. And asking that question really sets up a team to think about a bench, about individual replacements, and about emergency backfills or stopgap needs. So you think about it all kinds of different ways, hopefully in just one question.

Dr. Shari Simpson: I love that. Well, Megan, this was a great discussion. Really kind of helped invigorate me as I think about, you know, succession planning and different ways that we can approach it and really get to the heart of what we're trying to do in our organizations with this, you know, very tactical

process that we often have to go through. So thanks for sitting down and chatting with me about it.

Megan Leasher: Thanks, Shari. So glad to be here. Thanks for inviting me.

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