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Cultivate The Talent to Power What's Next

Invest in the Roles that Matter Most

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Welcome

What role — if left vacant — would keep you up at night?

Let us know in the chat!

Critical roles span more than just the C-Suite; they're roles that have an outsized impact on the organization.

They are roles that are **hard to fill**, are **in high demand**, and **require unique capabilities** that are critical to the organization's future relevance.

The roles deemed critical are **not always the most obvious**; they aren't necessarily those of the highest rank, pay, or visibility.

The roles have a **disproportionate impact on the organization's ability to execute and innovate** on its strategic and cultural objectives.
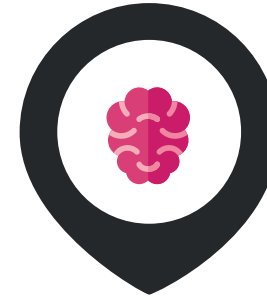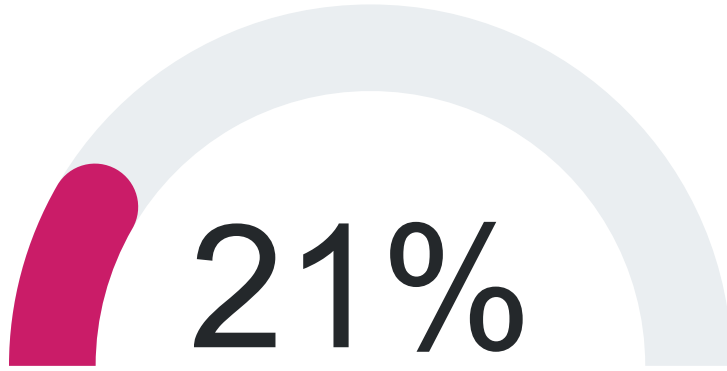
The roles typically require **unique skills, deep institutional knowledge**, or have **a direct and significant influence** on key performance indicators.

If left vacant, **the absence of capable people in these roles can severely hinder business goals** and jeopardize competitiveness.

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The priority is clear...and the gaps are stark.

21%

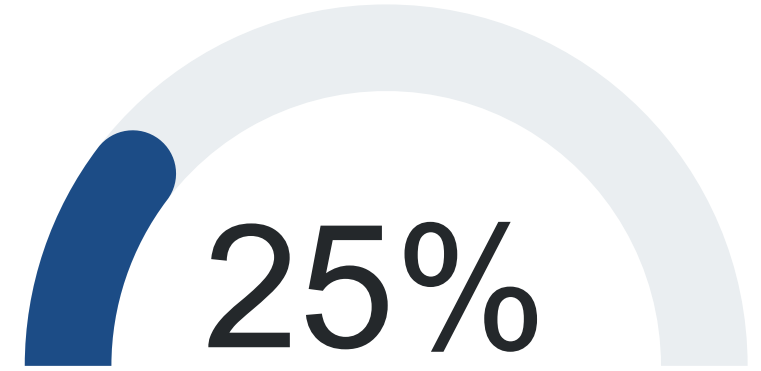Only 21% of HR leaders believe successors of critical roles are truly ready when needed.

Readiness Gap

50%

Organizations are developing more mature strategies...half are moving past exec level to mid-level roles to define what is critical.
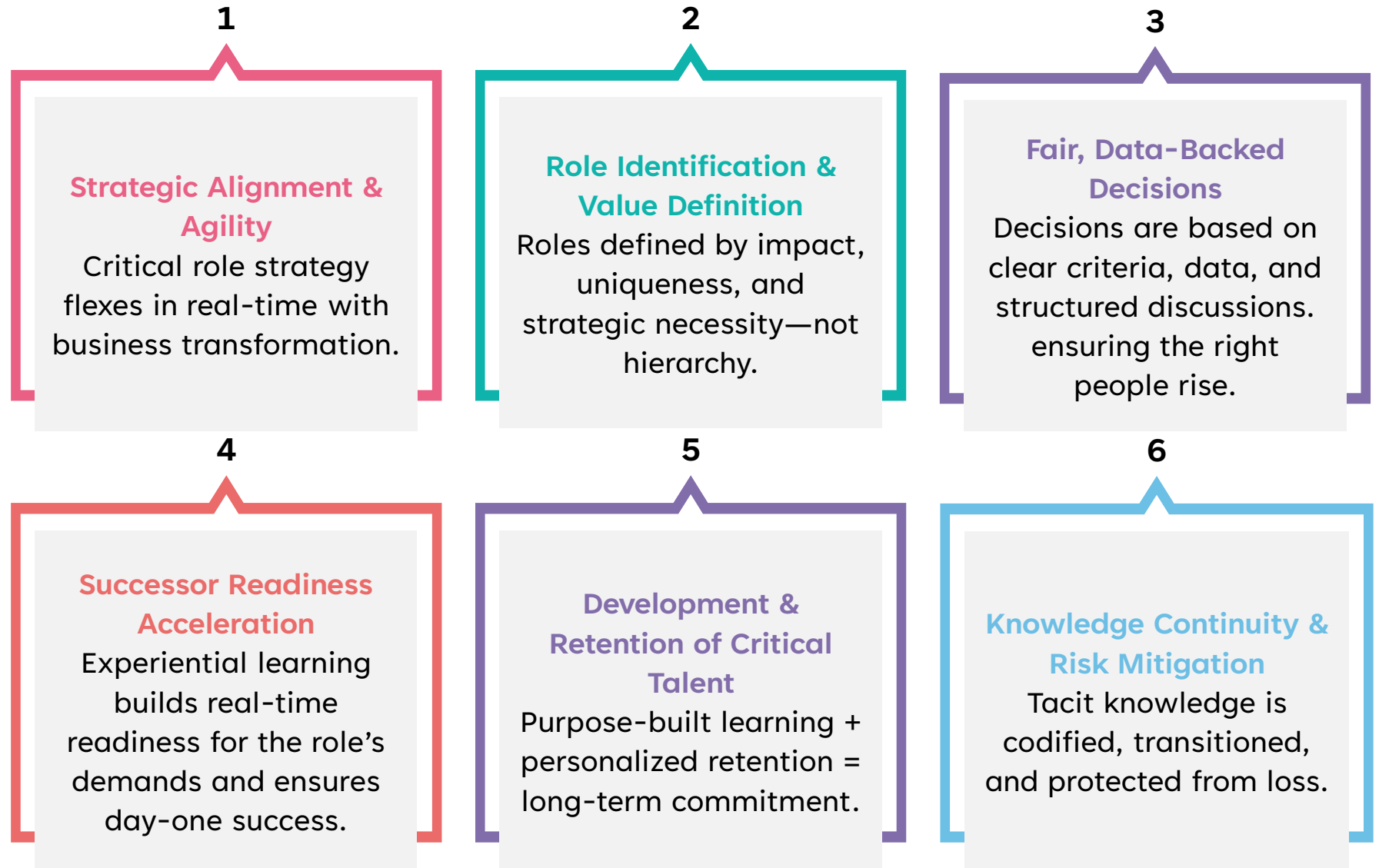
Clarity Emerging

25%

Only 25% of organizations say there is a development plan for the incumbents of critical roles.

Development Insufficient

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We know critical role work is urgent, and we also know it can be tough to execute.

Failure to Execute After Identification
Even when critical roles are identified, organizations don't follow through with structured development, enablement, or accountability.

Inadequate Development to Accelerate Readiness
Lack of stretch assignments, coaching, or cross-functional exposure leaves potential successors unprepared when roles open.

Lack of Accountability and Metrics
No one owns the outcome; success isn't measured (e.g., how many roles have ready successors or how long transitions take).

Common reasons why critical role efforts **fail**

Bias in Successor Selection
Decisions are driven by proximity, tenure, or familiarity, not data or future-fit capabilities—resulting in shallow or non-diverse pipelines.

Failure to Set Realistic Expectations
Without job previews, successors may be surprised by the pressures or realities of the role—leading to dissatisfaction or derailment.

Limited Talent Pool
Succession is focused on a narrow slice of the org—often HQ or a single function—ignoring hidden or emerging talent.

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We have found six core factors that underpin any successful, future-ready critical role strategy.

1

Strategic Alignment & Agility
Critical role strategy flexes in real-time with business transformation.

2

Role Identification & Value Definition
Roles defined by impact, uniqueness, and strategic necessity—not hierarchy.

3

Fair, Data-Backed Decisions
Decisions are based on clear criteria, data, and structured discussions. ensuring the right people rise.

4

Successor Readiness Acceleration
Experiential learning builds real-time readiness for the role's demands and ensures day-one success.

5

Development & Retention of Critical Talent
Purpose-built learning + personalized retention = long-term commitment.

6

Knowledge Continuity & Risk Mitigation
Tacit knowledge is codified, transitioned, and protected from loss.

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How future-ready is your approach to critical roles?

Criteria	Basic	Developing	Future-Ready
Strategic Alignment & Agility: Critical role strategy flexes in real-time with business transformation.	Static list of roles and people based on org charts and legacy structures.	Roles and people are reviewed periodically and updated based on major org changes or leader input.	Roles and people are dynamically aligned to business transformation and future-state needs.
Role Identification & Value Definition: Roles defined by impact, uniqueness, and strategic necessity—not hierarchy.	Role selection is based on titles or intuition.	Some criteria are used (e.g., revenue impact), but not consistently applied or socialized.	Transparent, validated criteria guide identification, with regular review from leadership.
Fair, Data-Backed Decisions: Decisions are based on clear criteria, data, and structured discussions, ensuring the right people rise.	Decisions rely on manager discretion or informal opinions.	Some data (e.g., performance reviews) are considered, but decision-making application varies.	Decisions are based on clear and objective criteria and data.
Successor Readiness Acceleration: Experiential learning builds real-time readiness for the role's demands and ensures day-one success.	Successors are identified but often underprepared for the role realities.	Successors gain some exposure (e.g., mentoring); immersive or structured development is inconsistent.	Successors engage in deliberate, experiences (e.g., simulations, shadowing) that build readiness.
Development & Retention of Critical Talent: Purpose-built learning + personalized retention = long-term commitment.	There are one-size-fits-all development and ad hoc retention efforts.	Some targeted development exists, but it's not consistently across critical roles.	There's ongoing and role-specific development, with individually-tailored retention strategies.
Knowledge Continuity & Risk Mitigation: Tacit knowledge is codified, transitioned, and protected from loss.	There are no formal plans to retain institutional knowledge – it's lost as incumbents leave.	Knowledge capture is sporadic (e.g., exit interviews), with limited reuse or planning.	Knowledge is codified, transferred through mentoring, and embedded in transitions.

We most often see three distinct critical role needs...

1

Building Skill in Today's Role

Reasons For Critical Role Need:

- Help incumbents in role grow with evolving expectations
- Need to upskill and adapt to shifting business needs and demands

What It Looks Like:

- Targeted skill development based on evolving challenges
- Often framed as role-specific development, most effective when accompanied with assessment

2

Identifying and Readying the Bench

Reasons for the Critical Role Need:

- Identify who's in your bench or pipeline
- Build their readiness for future transitions

What It Looks Like:

- Often starts with a diagnostic or nomination process to define who is in the bench
- Assessment clarifies where to focus development, based on role-fit or gaps
- Targeted development that includes a realistic job preview of the role before they step foot in it

3

Identifying the Next Leader

Reasons for the Critical Role Need:

- Need to make confident, high-stakes selection decisions
- Want to bolster the succession strategy with objective data
- Support onboarding and role transition with personalized insight

What It Looks Like:

- A robust, multi-method assessment to support accurate, defensible decisions for selection
- Targeted development and coaching—ensuring new leaders accelerate quickly in-role

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