



Integrating leadership development and succession planning best practices

Leadership and
succession
planning

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Abstract

Purpose – Organizations often fail to utilize managerial personnel effectively for leadership development and succession planning systems, and many execute these critical practices through separate human resource functions that shift the responsibility for leadership development away from line managers. The purpose of this article is to present a best practices model for optimal development of the leadership pipeline and a series of practical recommendations for organizations.

Design/methodology/approach – A group of 30 CEOs and human resource executives across 15 best practice organizations were asked via semi-structured interviews to describe the content and delivery of their respective organizations' leadership development and succession planning practices.

Findings – Analysis of interview data indicated that best practice organizations effectively integrate leadership development and succession planning systems by fully utilizing managerial personnel in developing the organization's mentor network, identifying and codifying high potential employees, developing high potentials via project-based learning experiences and manager-facilitated workshops, establishing a flexible and fluid succession planning process, creating organization-wide forums for exposing high potential employees to multiple stakeholders, and establishing a supportive organizational culture.

Research limitations/implications – The interview data are drawn from a relatively small number of executives and from a single industry, which may limit the overall utility of the findings.

Originality/value – This study offers needed empirical support for the value of integrating leadership development and succession planning practices through utilization of managerial personnel. Management development practitioners will benefit from assessing their respective organizations' current practices *vis-à-vis* those discussed here, while scholars may utilize the best practices model for generating further research on the role of managerial personnel in talent management systems.

Keywords Leadership, Management development, Succession planning, Leadership development, Best practice

Paper type Research paper

Organizations of all sizes and industries are currently facing a range of leadership development challenges, including decimated mid-management levels that often rob high-potential managers of critical on-the-job experiences, depleted resources for employee development, and a rapidly aging workforce that may create shortfalls of



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experienced managerial talent for senior leadership positions (Rothwell, 2002). The widespread flattening of organizational structures and significant changes in work arrangements force executives and management development professionals to rethink how high potential managers attain the requisite developmental experiences for senior leadership. Furthermore, US workforce statistics suggest that succession planning poses an incredible challenge as the baby boomer generation retires and far fewer college-educated workers are prepared to replace them. In addition, a recent *Journal of Management Development* article (Kilian *et al.*, 2005) articulated the specific career advancement challenges that women and people of color often face in corporate environments, including a lack of mentors and personal networks, stereotyping, and a lack of visible and/or challenging assignments.

However, research evidence suggests that many highly successful companies overcome these and other challenges by marrying the leadership development and succession planning processes for optimal identification, development, and placement of leadership talent (Conger and Fulmer, 2003). Eli Lilly, Dow Chemical, Bank of America, and Sonoco Products are examples of firms that avoid the near-sighted *replacement* approach to succession planning and adopt a long-term perspective for developing and managing talent throughout their organizations. Indeed, Kur and Bunning's (2002) recent review of succession planning and leadership development practices argued that "corporate leadership development can no longer simply rely on planning the replacement of existing leaders" (p. 761) and that organizations must focus on developing the leadership function rather than individual leaders. Unfortunately, many organizations confuse effective talent management with replacement planning, which is focused narrowly on identifying specific back-up candidates for given senior management positions and essentially functions as a forecast (Kesler, 2002). Conversely, highly successful organizations focus on creating a comprehensive set of assessment and development practices that support the entire pipeline of talent across the organization (Charan *et al.*, 2001).

There is also growing evidence that organizations are increasingly engaging managerial personnel in the leadership development process, and that managers add unique value to building the leadership pipeline beyond that of management development specialists, consultants, academics, or other professionals (Tichy, 2004; Allio, 2003). The most prominent example of this approach is General Electric's (GE) John F. Welch Leadership Center at Crotonville, a comprehensive development program in which executives and managers at all levels are largely responsible for teaching the curriculum and delivering a range of leadership development activities (Tichy, 1989). Each year several thousand GE managerial employees attend leadership development programs primarily taught by corporate officers, business unit CEOs and other senior executives, and early-career managers. In addition to conducting workshops on key GE strategic challenges, executives facilitate action learning projects in which participants return to their organization with aggressive agendas for change. Not surprisingly, many CEOs at leading companies have adopted the executive-led approach to leadership development, including 3M's Jim McNerny, Yum!Brands' David Novak, Home Depot's Bob Nardelli, and Nokia's Jorma Ollila. The basic philosophy of this approach is best articulated by one of the architects of GE's program, Noel Tichy, who is currently director of the Global Leadership Program at the University of Michigan Business School:

Companies are successful to the extent that they have leaders at all levels of the organization. Any institution that invests in the development of leaders at all levels is going to get ahead of its competition. However, the worst people in the world to develop leaders are professors and consultant leadership trainers. There is an industry of such trainers traveling from company to company attempting to do the job of a leader. It's the principle job of a leader to help develop the next generation of leaders. Unfortunately, many leading companies do not build good leadership pipelines because their leaders don't do the teaching of their own managers. There are some exceptions . . . but they're not common (Allio, 2003).

The purpose of this article is to better understand how organizations effectively marry leadership development and succession planning systems while fully engaging managerial employees in the process. The exemplary talent management approaches by leading companies suggest that the field of management development stands much to gain by a clearer understanding of how leadership development and succession planning are effectively integrated, and the roles that managers and management development professionals perform in such a process. This paper is organized into several sections. To begin, a review of the extant research on leadership development practices and a description of the present study's participating executives, organizations, and research procedure are provided. Next, I discuss a best practices model that summarizes the key findings of this study regarding the integration of leadership development and succession planning practices. Furthermore, I present the implications of this model in the form practical recommendations for organizations and management development practitioners. Finally, I discuss the limitations of this study and provide a critical analysis of the study's leadership development best practices.

Research review and study participants

The sample of executive participants and organizations was selected based upon their outstanding commitment to executive development and demonstrated effectiveness in executive succession decisions. The participants in this study included 30 CEOs and senior human resource executives across 15 US healthcare organizations, including seven single-site hospitals, seven multi-site healthcare systems, and one medical group. Both the CEO and senior human resource executive were interviewed at each organization given the critical roles that both executives perform in the leadership development process. All executives were recruited for the study through contacts at a leading national healthcare executive search firm in the USA. Discussions with senior partners at several of the firm's locations identified 15 national healthcare organizations renowned for best practice leadership development methods and highly successful CEO successions. The criteria for leadership development best practices were derived from the extant research, particularly reviews and meta-analyses by Collins and Holton (2004), Day (2001), Burke and Day (1986), and Kur and Bunning (2002). According to these reviews, best practice leadership development methods include:

- 360-degree feedback;
- executive coaching;
- mentoring;
- networking;
- job assignments; and
- action learning.

The best practice leadership development methods are summarized in Table I.

The US healthcare industry was targeted in this study for several reasons. The industry faces particularly challenging hurdles to effective leadership development and succession management, including many of the challenges discussed earlier in this article. A recent nationwide study of 1,600 hospitals and health systems demonstrated that nearly two thirds of responding CEOs believe there is a shortage of healthcare leaders who are prepared to assume executive roles in the future (Doody, 2002). A majority of these CEOs also noted that the healthcare industry drives away many of its future leaders through lack of resources, proper mentoring, and developmental opportunities. The current trend among hospital CEOs is to retire between the ages of 55 and 60, suggesting that many of the industry's top hospital systems will need to identify a new CEO in the near future (Thrall, 2001). Also, the industry overall has experienced tremendous cuts in middle-management positions that provide valuable developmental experiences and contribute to succession planning. Consequently, leadership development programs in hospitals and healthcare systems must strive to fill a need that middle-management levels once provided. Thus, the healthcare industry provides fertile ground for studying the growing roles that managers at all levels are performing in the talent management process.

The primary method of data collection was semi-structured interviews with each executive. The interviews consisted of several questions that sought to identify talent management best practices and understand how leadership development and succession planning are effectively integrated utilizing managerial employees. The interviews were conducted in the executives' offices and tape-recorded for subsequent transcription and analysis. Interviewees were asked the following:

- What are the primary leadership development and succession planning practices in your organization?
- What are the critical success factors for effectively integrating leadership development and succession planning practices?
- How are managerial personnel utilized to deliver an integrated talent management process?

The interview transcripts were analyzed using the content analysis technique (Weber, 1985), a quasi-statistical approach that turns textual responses into quantitative data for statistical testing. Across the three questions, there were 396 responses from the 30 executives. To implement the content analysis technique, I teamed with two research professionals to independently code the interview text according to the primary research questions. Next, we compared one another's codes, discussed disagreements, and arrived at an agreed upon list of primary codes. In order to gain verification of the coding scheme outside our research group, we sent our list of codes and transcripts to two outside reviewers. Once additional codes were added and modified according to the outside reviewers' feedback, we clustered the master list of codes into six primary research themes:

- (1) Developing Pervasive Mentoring Relationships;
- (2) Identifying and Codifying Leadership Talent;
- (3) Enhancing High Potentials' Visibility;
- (4) Assigning Action-Oriented Developmental Activities;

Leadership development practice	Description	Key references
360-degree feedback	Multi-source ratings of leadership performance; organized and presented to management personnel	Atwater and Waldman (1998), Kluger and DINisi (1996), Waldman <i>et al.</i> (1998), Walker and Smither (1999)
Executive coaching	Practical, goal-focused one-on-one learning; usually with a professional coach or more senior manager	Hall <i>et al.</i> (1999), Kilburg (1996), Olivero <i>et al.</i> (1997)
Mentoring	Advising/developmental relationship with a more senior manager; both formal and informal mentoring relationships	Chao <i>et al.</i> (1992), Dwyer (2003), Lankua and Scandura (2002), Ragins and Cotton (1999)
Networks	Developing connections with other managers in different functions, workgroups, or geographic areas	Dwyer (2003), Forret (2004), Kram and Isabell (1985), Ragins and Cotton (1999)
Job assignments	Providing stretch assignments in terms of job role, function, or geographic area; often requiring skills and knowledge just beyond the individual's capability	Campion <i>et al.</i> (1994), McCauley and Brutus (1998), Ohlott (1998), Stewart (1984)
Action learning	Project-based learning directed at current, critical business problems; often involving cross-functional teams of high potential managers	Baird <i>et al.</i> (1999), Blackler and Kennedy (2004), Dotlich and Noel (1998), Jennings (2002)

Table I.
Leadership development
best practices

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- (5) Leadership Development Through Teaching; and
 - (6) Reinforcing an Organizational Culture of Leadership Development.

In the sections below, each theme is described and supported with excerpts from the interview data, and an integrated model of leadership development and succession planning is provided. Table II illustrates the research themes, frequency and percentage of responses, and example excerpts.

Integrating leadership development and succession planning

The model presented in Figure 1 summarizes the primary research themes from this study regarding how organizations successfully marry leadership development and succession planning processes through active utilization of managerial personnel. Starting with the upper left box, the model depicts managers performing the critical role of developing mentoring relationships in their own workgroup and throughout the organization. Among other functions, mentoring relationships consist of discussions regarding career planning, assessment of core strengths and areas of improvement, and development of leadership competencies. Managerial personnel are also actively engaged with human resource professionals in identifying high potential employees and assessing the bench strength of their respective units. As high potential employees emerge, managers at all levels are engaged in delivering leadership development activities such as teaching in-house courses and workshops, facilitating action learning projects, and creating assignments that fall outside the employee's functional background. Next, high potential managers demonstrate their talents through organization-wide forums, including leadership academies that showcase action learning projects for top management team members and board members. Finally, succession decisions for managerial positions are driven by consideration of a diverse range of candidates rather than exclusively direct reports. Below, each of these research themes and their corresponding best practice findings are discussed in the context of interviewee excerpts and research on leadership development and succession planning.

Developing pervasive mentoring relationships

Research on mentoring relationships in organizations provides strong evidence that employees with mentors are much more likely to experience a range of positive outcomes, including enhanced job performance, greater promotions and compensation, organizational commitment and job satisfaction, personal learning, and reduced turnover intentions (e.g. Lankua and Scandura, 2002; Chao *et al.*, 1992; Dwyer, 2003; Turban and Dougherty, 1994). Indeed, research demonstrates that mentors provide protégés with both psychosocial benefits (e.g. acceptance, encouragement, and coaching) and career facilitation benefits (e.g. sponsorship, exposure, and challenging assignments) (Kram and Isabell, 1985; Noe, 1988; Yukl, 2006). The executives in this study reported that their organizations actively promote the value of mentoring by delivering formal mentoring programs and encouraging the formation of informal mentoring relationships among managers and high potentials. Managers develop mentoring relationships with high potential employees of varying business units, work experience, and functional/product expertise, thereby creating a mentor *network*. The practice of managers developing a network of mentors rather than traditional

Integration success factors	Examples	Frequency (percentage) of responses
Assigning action-oriented developmental activities	I mean as much as we have courses and things like that it really comes down to putting people into roles, giving them stretch assignments and then seeing how they do it. And that's when we look at our succession planning documents and the like, and they really become a collection of our assessments of people based upon how they've done with the myriad of projects and assignments that we've given them and then we measure them against that	110 (27.7)
Identifying and codifying leadership talent	We identify second, third, and fourth tier to any leadership position so we know who's behind the current leader and then who is the next level behind that and we examine those individuals. We look at their assignments, roles, and backgrounds. It's a dynamic list that every six months to a year we are repositioning people, talking about people, dropping people off, and putting others back on	94 (23.8)
Developing pervasive mentoring relationships	I think that there is much more of an interim or progressive process than the kind of traditional mentoring role where you're in a job and you can see the person ahead of you and you learn from one particular person doing that individual job. You're going to work with physicians, you're going to work with administrative individuals, nursing leadership, and as you solve problems you're always learning from the people you're solving with	73 (18.5)
Leadership development through teaching	I interview the top 155 jobs in this company; I don't care where they are. What I look for is the cultural fit and their ability to learn and teach. Because fundamentally if you don't have an organization of mentors and teachers and those who are willing to learn, then you have nothing, because the cultures will take on a totally different light. I insist that people become both the learner as well as the teacher	67 (16.9)
Enhancing high potentials' visibility	The [Academy] has been a good thing for us to be able to see talent that might exist that we wouldn't otherwise get to see. It gives my level exposure to someone that unless I had some reason to cross paths, I would never cross their path. Some managers may not have been on the fast track, but then they were part of this Academy and all of a sudden, when a position like the CEO of one of the other hospitals opened up, that was the person to take	30 (7.7)
Reinforcing a culture of leadership development	The manager is supposed to talk in each case with the person reporting to them about just where they are career wise in terms of aspirations, where they are going, etc. Then we've been able to take certain dimensions and then overlay them into our performance review process. This is the first year that we've actually incorporated the succession planning dimensions in the performance review	22 (5.4)

Table II.
Frequency and percentage of responses for integration success factors identified by CEOs and human resource executives

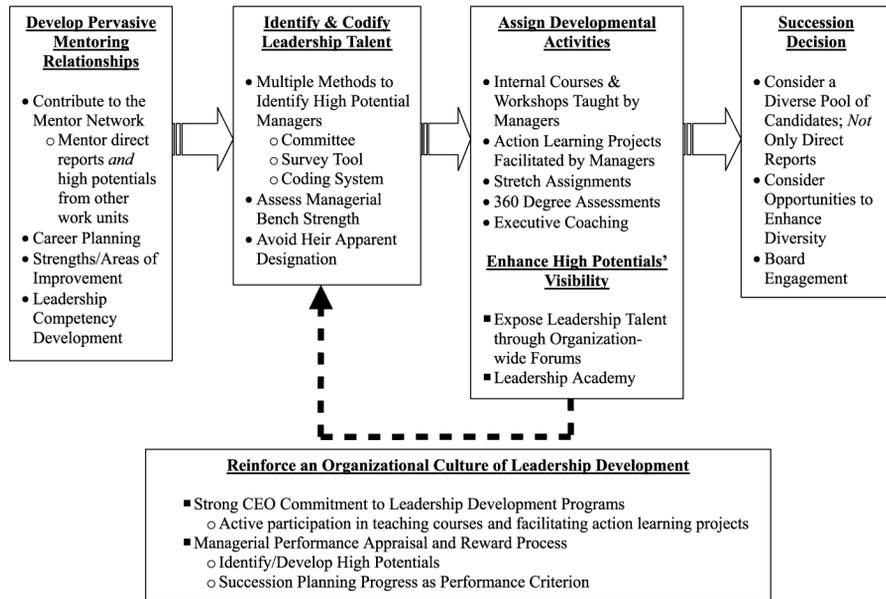


Figure 1.
How an integrated leadership development and succession planning process requires active manager participation

one-on-one mentoring is consistent with recent research suggesting that mentor networks are critical to managerial career success in today's organizations and that having multiple mentors is strongly correlated with high promotion rates (de Janasz *et al.*, 2003). For example, one of the leading single-site hospitals in the study augments existing informal mentoring relationships with a formal mentoring program designed to provide employees greater access to a network of highly experienced leaders. Based on the premise that employees need multiple mentors at different points in their career, and that access to experienced leaders through informal means is often quite difficult for many employees, the organization's mentoring program develops high potentials' leadership competencies through personal coaching, group discussions, career guidance, and exposure to senior leaders. The CEO of this hospital illustrates the personal learning benefits of mentoring relationships and the importance of managers adopting a proactive role in providing developmental opportunities to high potential employees:

I think if I had not had that experience of starting off going to board meetings, working on projects that were of significance to the organization, I think that I probably would be more reluctant to give people that opportunity now when they come into this organization. So because of that orientation and the opportunities [my mentor] gave me, it has translated into an administrative resident here right now who is working on a problem related to increasing group health costs. It's a very important issue for us and that's her project, so she's giving board presentations, attending medical executive staff meetings, and I just don't know that I would have been as open to creating those opportunities for somebody just starting out if my mentor hadn't had that orientation with me and other administrative fellows that were around at the time.

The finding that the organizations in this study widely endorsed both informal and formal mentoring for leadership development purposes is consistent with recent

research and practice. While mentoring has long been a popular approach to developing high potential managers (Yukl, 2006), the effectiveness of mentoring programming for developing high potentials is largely dependent on the quality of the relationship, type of program, and manner in which the program is developed and maintained. The inclusion of an informal mentoring program is critical given research suggesting that informal mentoring is often more successful than formal mentoring due to possible personality conflicts, lack of mentor commitment, and lower levels of career guidance and psychosocial support associated with assigned mentors (Noe, 1988; Ragins and Cotton, 1999). Furthermore, the design and maintenance elements of the organizations' formal mentoring programs were consistent with Hegstad and Wentling's (2004) recent assessment of exemplary formal mentoring programs in top performing US companies. Specifically, the formal mentoring programs across organizations in the present study are offered to a wide cross-section of managerial personnel and do not provide incentives for mentor participation to better ensure intrinsic motivation. Furthermore, significant effort is devoted to a structured process of matching participants based on common background and interests, protégé developmental needs and mentor expertise, and job level. As cited in Hegstad and Wentling's (2004) assessment, the organizations in the present study did not devote significant attention to evaluating the impact of mentoring programming on actual leadership development outcomes (e.g. changes in leadership competencies), instead focusing on evaluative metrics centered on participation and satisfaction. More discussion of the limitations and critique of the organizations' talent management systems will be provided later in the paper.

Identifying and codifying leadership talent

In addition to playing a primary role in developing effective mentor networks, managers must also be actively involved in identifying and codifying leadership talent across the organization. While the methods and tools for such purposes differed across the sample of organizations, including committees, survey instruments, and career development color-coding systems, two common themes emerged from the executives' responses:

- (1) avoiding the *replacement* approach to succession planning by adopting a long term perspective on identifying and developing leadership talent throughout the organization; and
- (2) fully engaging managerial personnel in the talent identification and codification process.

In the excerpt below, the CEO of a national, multi-site healthcare system describes his respective organization's survey instrument and career development system for identifying and codifying leadership talent:

I think [the previous senior executive team members] were primarily concerned about the CEO level. We took it much more broadly than that and said "we really need to determine our level of leadership talent, system-wide in management". We put together a questionnaire and we have been driving it down the organization. We did it initially at the executive level, and so what I did was sit down with all my reports and talk to them about their career plans, pull out their own resumes, etc., and I evaluated them using a fairly simple scale: (1) those that were still learning the skill set required to do their current job very well, (2) those that were

really quite capable and doing their existing job well but were probably anxious to look for new opportunities to challenge themselves, and (3) those that clearly were at the step where they needed to have a broader responsibility or we were going to lose them if we didn't find new opportunities for them. I did that with all of my executives and they were responsible for doing that for their subordinates, and then the administrators, etc.

An important finding related to avoiding the replacement mentality is resisting the temptation to designate an heir apparent for key executive positions. Best practice organizations resist the tendency to designate an heir apparent and focus on identifying and developing multiple potential successors for a range of positions (e.g. Kur and Bunning, 2002; Conger and Fulmer, 2003; Charan, 2005; Biggs, 2004). Although executive team members are expected to identify someone who could immediately serve in an emergency situation, most of the organizations do not target individuals for executive succession. The CEO of a renowned single-site hospital noted:

We certainly have an expectation that in every key executive position, there is someone who is identified as someone who could step in on the short-term. I would say that it would be more the exception rather than the rule where there would be a kind of conscious commitment to groom someone for specific succession. The approach we take is to work on their people skills development and leadership capabilities in general.

Of course, the enormous risks in identifying and developing an heir apparent include the possibility of that person leaving the organization before the position is available, the inflexibility that saddles the succession decision, and severely damaged morale and potential turnover of leadership talent not targeted for succession (Biggs, 2004). In the case of CEO succession, Biggs's research suggests that heir-apparent designations are often unable to assume the CEO role because:

... formally designating an heir may be the equivalent of placing a target on the heir's back. Issues dealing with the departing CEO may be transferred onto the head of the heir-apparent, and the heir become the target of ill-will really meant for the departing or departed CEO (Biggs, 2004, p. 107).

The general consensus among the executives in this study is that organizations are better served by investing the necessary time and effort in identifying and developing multiple high potential managers to ensure flexibility in key executive successions. Indeed, research shows that organizations with outstanding reputations for leadership development, including Colgate-Palmolive, Eli Lilly, Dow Chemical, Bank of America, and Sonoco Products, adopt a very flexible and fluid approach to succession planning (e.g. Charan, 2005; Conger and Fulmer, 2003; Tichy, 2004; Fulmer and Conger, 2004). In short, employees fluidly move on and off the list of high potentials and a diverse range of candidates is considered for succession, not merely direct reports. Consistent with the present study's findings, Charan's (2005) review of CEO succession best practices describes the highly flexible process at Colgate-Palmolive in which leadership evaluation begins in the first year of employment for managerial personnel while lists of high potentials are developed, debated, and regularly revised by multiple stakeholders (subsidiary leaders, local general managers, division heads, and the Colgate-Palmolive Human Resource committee composed of Colgate's CEO, president, COO, and senior VP of HR). Throughout their respective careers, high potentials receive assignments that truly stretch their abilities and expose them to new markets and consumers, outside executive coaching, 360-degree feedback, and a series of

“visibility programs” in which they meet with the company’s most senior leaders. As illustrated in Figure 1, many executives in the present study emphasized the importance of considering multiple candidates for a given vacancy and not devoting undue attention to the immediate direct reports as likely successors. The CEO of a multi-site system asserted:

It doesn’t have to be the obvious person in the hierarchy because I’ve seen it just too many times where we took somebody out of this little niche and stuck them in a different area and an amazing blossoming occurs. Sometimes it doesn’t work and you can’t penalize that person . . . if they don’t work out here, we’ll move them over here and we don’t just wipe them out and say you’re on your own.

Similarly, a critical consideration for the succession decision is the opportunity to enhance the diversity of the senior executive team. Several executives cautioned that relying too much on the hierarchy to identify likely successors (replacement planning) severely limits opportunities to enhance senior management diversity, a finding widely reported by practitioners and researchers (e.g. Kilian *et al.*, 2005; Leibman *et al.*, 1996; Kesler, 2002; Rollins, 2002). In the present study, the CEO of a multi-site system stated that:

. . . the weakness [of asking executives to identify and groom high potentials] is obvious; you can fall in love with yourself and you can be incredibly insulated if you’re beginning to hire [and develop] only like and then like picks like. I try to balance that as best I can by recognizing that across the broader 200 plus managers in our organization we still have a tremendous amount of diversity, and from that we’re going to have people looking.

Thus, organizations that avoid the replacement planning approach to success reap the dual benefits of a truly comprehensive assessment of leadership talent and potentially optimal placement of minority candidates for executive positions. Indeed, Kilian *et al.*’s (2005) recent review of the career advancement barriers for women and persons of color concluded that mentoring programs, formal networks, and high potential identification and development systems are critical means of improving diversity at senior ranks. The researchers also asserted that organizational leaders must emphasize diversity in the high potential identification process “by requiring diverse slates (even if it requires going to external sources), and then appointing qualified women and minorities whenever possible. There is evidence that such a targeted focus gets better results” (Kilian *et al.*, 2005, p. 64).

Assigning action-oriented developmental activities

In addition to fluidity and flexibility regarding lists of high potential employees, another hallmark of exemplary succession planning systems is a sharp focus on action-oriented developmental activities designed to enhance leadership competencies aligned with the organization’s strategic goals (e.g. Rothwell, 2002; Kesler, 2002; Charan, 2005). As illustrated in Figure 1, the executives reported a range of developmental activities at their organizations, including stretch assignments, action learning projects, and internal courses and workshops. While these activities are consistent with research on leadership development best practices (Burke and Day, 1986; Day, 2001; Collins and Holton, 2004; Yukl, 2006), the executives’ responses also indicated that effective execution of such activities demands active participation from managers at all levels – a critically important design feature that distinguishes the

leadership development philosophy of these organizations. The CEO, senior executives, and mid-career managers, with the support of human resource professionals, deliver the projects, assignments, and courses. Regarding stretch assignments, the executives reported that the many developmental benefits include exposing high potentials to several functional and product areas, providing invaluable working experiences with a variety of executives and colleagues, and collecting diagnostic data on high potentials' performance to inform the succession planning decisions. As managers' developmental needs change over the course of their career, executives task them with stretch assignments that address the organization's strategic issues and adjust the lists of high potentials according to their performance on such assignments. The integral role of stretch assignments is illustrated by excerpts from the CEOs of two multi-site healthcare systems:

Some people view giving people more of the same thing develops them, and it really doesn't, it just burns them. The diversity is key and sometimes even if it seems like it's from out of left field, it's amazing sometimes how well someone can take a project and run with it. We have given people assignments that at first they resisted and said, "this doesn't have anything to do with whether I get an increase in pay" or "I just really don't think that resonates with me". And we encourage them to take it for six months and emphasize that they're not going to be a failure if we change, but to just try it out. It's amazing how sometimes they just grab on to it and run. And I probably push that even more because that's what they did to me.

We provide a rotation of job assignments and leadership development opportunities. Our people can stay guaranteed in place, but we may take them for a six-week ride into different management projects. And we're able to see how they respond under stress, how they react, what comes naturally, where they have gaps, how they responded, and then be able to better craft their career needs as they go forward.

The finding that many organizations in this study utilized developmental assignments to for leadership development purposes is highly consistent with current research and practice. Researchers at the Center for Creative Leadership (CCL) have long studied the relationship between specific types of work experiences and leadership development (e.g., McCall *et al.*, 1988; McCauley, 1986, McCauley *et al.*, 1995), concluding that the amount of challenge, variety of tasks or assignments, and quality of feedback impact how much high potentials gain from developmental assignments. While there exists some evidence for the effectiveness of developmental assignments, such as longitudinal research at AT&T suggesting that diverse, challenging assignments early in one's career facilitates career advancement (Bray *et al.*, 1974; Howard and Bray, 1988), the research overall suggests that different skills are acquired from different types of developmental assignments. The organizations in the present study invest significant time and resources in matching high potentials' developmental needs with the specific challenges and learning opportunities afforded by various developmental assignments. As reviewed above, high potentials' performance on developmental assignments is tracked and utilized to inform succession planning decisions and subsequent assignments (e.g. McCauley *et al.*, 1995).

Enhancing high potentials' visibility

In addition to developmental assignments, action-learning projects served as a critical component of the executive development programs across the organizations. This type of hands-on leadership development method, dubbed "action learning" by Reginald

Revans (1982), has been a very popular approach to executive development for well over 20 years (Tichy, 1989, 2004; Day, 2001; Collins and Holton, 2004). In short, action learning projects assemble a group of high potential employees to study current business issues and make recommendations to senior management. Indeed, action-learning projects are central components of exemplary executive development programs at leading companies, including Eli Lilly, Bank of America, Dow Chemical, GE, and Dell (Conger and Fulmer, 2003; Fulmer and Conger, 2004). For example, Eli Lilly implements a bi-annual action learning program that assembles high potentials to focus on strategic issues identified by the CEO. The program involves identifying 18 employees with executive director potential, representing a mix of functions and regions, and employing them in teams that will work for six weeks to gather relevant data, interview subject matter experts and customers, and review best practice organizations. The program culminates with a formal presentation of recommendations to senior managers and the CEO, who often implements the recommendations immediately or suggests further analysis. A recent action learning project at the company involved developing an e-business strategy to generate growth. After interviewing more than 150 people over five weeks, the team presented a set of recommendations to senior managers and the CEO.

A distinguishing feature of the present study's best practice organizations is that action-learning projects are delivered through organizational-wide forums to enhance high potentials' visibility across the organization and develop their network. These forums, dubbed "leadership academies", typically house the entire executive development program but showcase action-learning projects as the culminating activity. Created to simultaneously develop high potential managers and expose them to multiple organizational stakeholders, a leadership academy is comprised of action learning projects and executive-taught workshops that are intended for early to mid-career managers who would benefit from in-depth exposure to managerial expectations and the inner workings of their organization. Across all of the leadership academy components, the action learning project and consequential exposure to senior executives and board members are critical program outcomes. Executive team members, board members, program participants, and academy alumni are called upon to generate project topics. At the end of the one-year program, participant teams present the results of their project to peers, executive team members, and board members at widely attended graduation ceremonies. Program faculty, comprised mostly of senior executives and managers, monitor progress on the projects throughout the year and provide necessary support to ensure completion. The following list includes examples of projects completed at one healthcare system's leadership academy:

- a year-long study of employee relations and the organizational changes necessary to make the organization a great place to work;
- a comprehensive study of operational and cultural changes for improved customer service; and
- an exploratory study of the potential benefits of developing a "smartcard" for patients and the community.

There are clearly many important benefits that accrue to organizations that invest in the development of a leadership academy as a vehicle for developing and exposing

high potential managers. In addition to limited costs and reducing the organization's dependence on consultants, leadership academies serve as a powerful vehicle for promoting cultural understanding across business units and providing powerful cross-functional learning experiences for groups of high potentials (Conger and Fulmer, 2003). These experiences force employees to look beyond their functional silos to address major strategic issues, thereby learning general management competencies that will be required in more senior positions (Kur and Bunning, 2002). Furthermore, action learning projects are showcased for senior management teams (and board members, in some cases) to allow for greater contact with high potential managers who may not otherwise have any exposure to the upper levels of the organization. One CEO explains the value of his multi-site system's leadership academy in identifying and developing leadership talent:

The *Academy* has been a good thing for us to be able to see talent that might exist that we wouldn't otherwise get to see. It gives my level exposure to someone that unless I had some reason to cross paths, I would never cross their path and if I did, it would be fairly brief. Some managers may not have been on the fast track, but then they were part of this *Academy* and all of a sudden, when a position like the CEO of one of the other hospitals opened up, that was the person to take. Even though some people thought it an odd choice, it was the right choice because we actually got to see them in a way that nobody else had seen them.

Leadership development through teaching

Consistent with the philosophy that managers are instrumental in developing the leadership pipeline, the organizations in this study require senior executives to teach classes and facilitate workshops on a series of leadership development topics. At one multi-site health system, senior executives from each hospital visit other campuses and present three-hour workshops on the operational, strategic, and cultural issues currently facing their respective hospital. The system's CEO, who participates in these sessions by discussing strategic planning and how each hospital's plan supports the system's strategic plan, reports that the "executive series" helps managers at each hospital understand other hospitals' perspective on operations, competition, financial indicators, and other performance issues. Among the many advantages of the executive series, he states that "managers can understand the other hospitals' perspective, and the series helps the integration of the system and the development of system culture but also an appreciation of the different hospital cultures". Similarly, executives at another multi-site system teach classes that describe "a day in the life" of an executive for management personnel across the system. The CEO of this system reports that "the senior executives, my executive team, we teach classes ourselves for all of our managers on what we call 'a day in the life'". The purpose of the sessions is to provide managers an opportunity to question the CEO and members of his executive team about their jobs, career progression, the challenges they faced and how they overcame them, and other executive development issues.

Research on executive development programs at leading companies supports the notion that managers must play an active role in developing the next generation of leaders through teaching experiences with high potential employees (Tichy, 2004). Dell, PepsiCo, 3M, GE, and Yum! Brands are just a few examples of organizations that have managers at various levels (including CEO) teach a range of classes to further develop their own leadership abilities and help build the organization's talent pipeline.

At GE, CEO Jeff Immelt asserts that the most important core competency of a GE leader is to be a teacher (Tichy, 2004). More than 15,000 high potential middle managers at GE are given fulltime assignments as “Black Belt” teachers of six sigma, the company’s highly successful total quality management program (Harry and Schroeder, 1999). The Black Belts, who must take a two-year leave from their regular jobs, teach all 300,000 employees how to apply the six sigma quality methodology to their projects. The interactive, two-way learning process involves high-potential teachers learning from and drawing on the knowledge and experience of the students. The highly interactive teaching process results in managers developing their leadership abilities and advancing their knowledgeable of the business through significant interaction with students. Many of the CEOs and human resource executives in the present study stated that the ability to teach and coach others was a critical leadership competency that their respective organization uses for selection decisions and leadership development planning. The president and CEO of a 22-hospital healthcare system described his philosophy on leadership development through teaching:

I interview the top 155 jobs in this company; I don’t care where they are. It doesn’t make any difference whether they’re physician leaders or otherwise. What I look for is the cultural fit and their ability to learn and teach. Because fundamentally if you don’t have an organization of mentors and teachers and those who are willing to learn, then you have nothing, because the cultures will take on a totally different light. I insist that people become both the learner as well as the teacher.

The finding that the organizations in the present study actively encourage learning and knowledge sharing by tasking their leaders with teaching responsibilities is consistent with research on how leaders facilitate learning organizations (e.g. Senge, 1990; Crossan *et al.*, 1999; Huber, 1991). Current research suggests that leaders create conditions favorable to learning by encouraging and supporting relevant learning practices such as manager-led workshops, after-activity reviews, benchmarking, six sigma, TQM, and quality circles (Yukl, 2006). By teaching employees and high potentials the fundamental operational, financial, and cultural issues facing their respective organization, the hospital and health system leaders are developing and refining shared mental models for understanding how the organization functions in its environment. Furthermore, the teaching process facilitates systems thinking and the ability to solve complex, systemic problems by helping employees better comprehend their conscious beliefs about the causes of organizational performance and also uncover their implicit assumptions of the reasons for success or failure (Senge, 1990). More generally, the teaching process actively reinforces the value of learning, encourages the effective dissemination of knowledge, and helps employees understand how they may apply such knowledge to their work and collectively influence important outcomes in the organization.

Reinforcing an organizational culture of leadership development

As illustrated in Figure 1, the integration of leadership development and succession planning practices through managerial engagement requires a supporting organizational culture. Specifically, the talent management process must be reinforced by an organizational culture characterized by strong and visible CEO commitment to leadership development (e.g. Hillman *et al.*, 1990; Valerio, 1990).

Research on leadership development strongly supports the notion that regardless of actual developmental methods, the acquisition of leadership skills is facilitated by visible CEO and other senior leadership support, immediate supervisor support, and an organizational culture that values learning and development (e.g. Ford and Weissbein, 1997; Tracey *et al.*, 1995; Yukl, 2006). The CEOs in this study, as well as Jim McNerney (3M), David Novak (Yum!Brands), Jeff Immelt (GE), and Roger Enrico (PepsiCo), make leadership development a top strategic priority and create a supportive organizational culture. CEOs and their senior management team members must go well beyond gratuitous support of leadership development by teaching courses and workshops, facilitating action learning projects, and engaging direct reports in regular discussions of high potential employees. Without strong support from the CEO and senior executive team, managers and employees will inevitably view leadership development and succession planning as non-essential activities and prioritize their efforts accordingly (e.g. Conger and Fulmer, 2003; Kesler, 2002; Ford and Weissbein, 1997). While human resource professionals play a critical role in developing the tools and processes for identifying, codifying, and developing leadership talent, managers at all levels must assume primary responsibility for building the organization's leader pipeline.

Another powerful component of an organization's culture is the performance management system and the manner in which managerial behavior is rewarded (Schein, 1992). Research on employee motivation and reward systems suggests that many organizations set out to reinforce desirable behaviors such as teamwork and the development of people skills, yet they reward contrary behaviors – individual performance and technical accomplishments (Kerr, 1995). Organizations that fully engage managers at all levels in the leadership development and succession planning system reinforce such behavior through the managerial performance appraisal and reward process. The CEO of a 58-hospital system stated that:

... the supervisor is supposed to talk in each case with the person reporting to them about just where they are career wise in terms of aspirations, where they are going, etc. Then we've been able to take certain dimensions and then overlay them into our performance review process. This is the first year that we've actually incorporated the succession planning dimensions in the performance review.

Similarly, the CEO of another multi-site system reported:

... we require every manager in our organization, as a part of their performance review, to have identified two people within their own supervisory purview to develop. Managers must believe that [the persons they identified] have demonstrated high potential, and then we try to talk with those people about the possibilities of moving up in the organization and assess their interest and so forth.

Incorporating leadership development and succession planning responsibilities into managerial job expectations and performance appraisal criteria are effective means of ensuring that succession planning is a top priority among managers at all levels (e.g. Kilian *et al.*, 2005; Charan, 2005; Yukl, 2006).

Limitations and critical evaluation

Although the sample of CEOs and human resource executives provided rich qualitative data regarding the leadership development and succession planning systems at best practice organizations, the relative number of participating organizations and

executives was somewhat limited. Furthermore, due to the fact that the sample of organizations was selected based on demonstrated excellence in CEO successions and leadership development practices, the range of organizations in the study was restricted. Finally, several best practice organizations, and their senior executives, declined to participate for reasons that included company policy precluding participation in such research studies, time constraints, and resistance to the research methodology and/or recording of interview responses.

Despite the range of best practice findings regarding leadership development and succession planning, a critical analysis of the organizations' talent management systems reveals areas of improvement. First, very few executive responses described efforts to empirically evaluate the effectiveness of their respective organization's talent management practices. Several recent leadership development reviews and meta-analyses (e.g. Collins and Holton, 2004; Day, 2000; Kur and Bunning, 2002) concluded that most organizations fail to empirically evaluate the implementation and outcomes of their leadership development programs, which robs them of the opportunity to diagnose problem areas or needed programmatic changes. The application of theory-driven evaluative methods (e.g. Chen, 1990), which model the conceptual links among program components and outcomes as well as key mediating and moderating variables, would allow program developers to diagnose needed changes. Given the paucity of evaluative research on leadership development practices, organizations would benefit from consultation with outside management development researchers to design appropriate evaluation studies that assess changes in knowledge (learning), behavior (expertise), and results (performance) (e.g. Collins and Holton, 2004; Kirkpatrick, 1998). Second, surprisingly few of the executive responses described 360-degree or multi-source feedback as a core leadership development practice. In fact, several executives indicated a general resistance to 360-degree feedback because of a perceived lack of convincing evidence for the efficacy of such methods. Although multi-source feedback is one of the most popular methods of management development and is widely used in large organizations (London and Smither, 1995), the empirical research on its effectiveness for leadership development purposes is mixed. Kluger and DeNisi's (1996) meta-analysis found a weak positive effect of behavioral feedback on performance, while Waldman *et al.* (1998) concluded that behavioral feedback can be useful in some situations but the evidence overall fails to support its widespread use as a leadership development tool. More recently, management development professionals have asserted that the manner in which behavioral feedback data are presented to managers determines the effects on leadership development outcomes (e.g. Conger and Toegel, 2003; Seifert *et al.*, 2003; Toegel and Conger, 2003); specifically, the utilization of group workshops and one-on-one follow up meetings with facilitators to help managers interpret their behavioral feedback is much more effective than simply producing a feedback report for participants.

Additional areas of improvement stemming from a critical analysis of the organizations' talent management systems include the general lack of outside perspectives on talent management and the implementation of action learning projects. The complete reliance on internal personnel for leadership development programming may create an insular perspective that limits the creativity and diversity of leadership development best practices. Furthermore, the implementation of action learning projects, which represent core leadership development methods at the best practice

organizations, could be enhanced with greater attention to recent research on action learning design principles that produce optimal leadership development outcomes. Specifically, Conger and Toegel (2003) recommend that projects focus on multiple learning experiences to build declarative knowledge as opposed to a one-time action learning experience, which is characteristic of the present study's organizations and very common in industry. Action learning project participants should be offered the opportunity to move directly into job assignments that build upon the project's lessons, policy recommendations, and/or organizational changes, which will perpetuate the learning process. Furthermore, action learning projects should involve ample and regular opportunities for reflective learning, which include active and objective feedback from coaches, facilitators, and teammates. Conger and Toegel (2003) state:

... without reflection and feedback, action learning would no different from a normal day on the job. An individual's personal interpretation of feedback can be ambiguous, and sometimes actually the wrong lessons can be learned from [action learning] experiences (p. 336).

Rather than allow opportunities for reflective learning at the end of the project, participants should reflect daily on the learning gains to that point in the project and avoid the tendency to allow task accomplishment overcome the process of learning.

Conclusions

It is clear that organizations of all sizes and industries face incredible challenges in preparing managerial personnel to assume future leadership positions. This article has introduced a best practices model for integrating the leadership development and succession planning process through optimal utilization of managers and a supportive organizational culture. The specific practices that organizations and management development professionals must execute to effectively build their leadership pipeline are summarized below:

- develop the organization's mentor network by fully engaging all managers in mentoring relationships with direct reports and high potential employees in other work units;
- ensure active manager participation in the organization's method of identifying and codifying high potential employees;
- fully engage managers at all levels in leadership development activities, including teaching courses and creating projected-based learning experiences (e.g. stretch assignments and action-learning projects) for high potentials;
- ensure a flexible and fluid succession planning process by avoiding heir apparent designations, frequently updating lists of high potentials based on project-based performance, and basing succession decisions on a diverse pool of candidates;
- create organization-wide forums (e.g. leadership academy) for exposing high potentials to multiple stakeholders, including senior executives and board members;
- establish a supportive organizational culture through active CEO and senior management participation in development programs and performance appraisal and reward systems that reinforce managerial engagement; and
- evaluate the effectiveness of leadership development practices through empirical studies that model program theory and assess knowledge, behavior, and results outcomes.

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