

Talent Assessment, Succession Planning, & Leadership Development for an **Academic Medical Center**

An academic medical center enhanced its leadership pipeline, improved the clarity of its succession plan, and developed high-potential leaders through a comprehensive executive talent strategy. Targeted assessments evaluated 121 senior leaders, inclusive of Physician Leaders, for 20 critical succession roles and set goals for improving the depth of the succession pipeline for Executive and VP roles. A dynamic dashboard improved visibility to high-potential talent across the health system, helping to guide actions and investments in leadership development and talent mobility by Executive Leadership and the Board. A custom Leadership Development Academy further strengthened leadership readiness, positioning the system as an employer of choice.



Health System Background



Academic health care system based in the mid-Atlantic integrating patient care, medical education, and research



Medical Center operates as a Level 1 Trauma Center and comprises hospitals, specialized care units, outpatient clinics, and extensive research programs



Encompasses prominent institutions such as the School of Medicine and Cancer Center, nationally recognized for research, innovation, and specialized patient services

Business Need



Identifying and developing the next generation of clinical and non-clinical leadership talent was essential



As part of an HR transformation, the Health System CEO initiated a leadership talent review, succession planning, and development process to:

- Build a strong pipeline of high-potential talent for future clinical and non-clinical leadership roles
- Solidify the health system as an employer of choice that develops and engages great talent
- Expand career growth opportunities within the organization
- Reduce turnover and manage human capital risk by more effectively engaging individuals in development

121

Leaders Assessed

20

Successors for Key Roles

3

Successors Per Critical Role

30

Future Leaders Developed

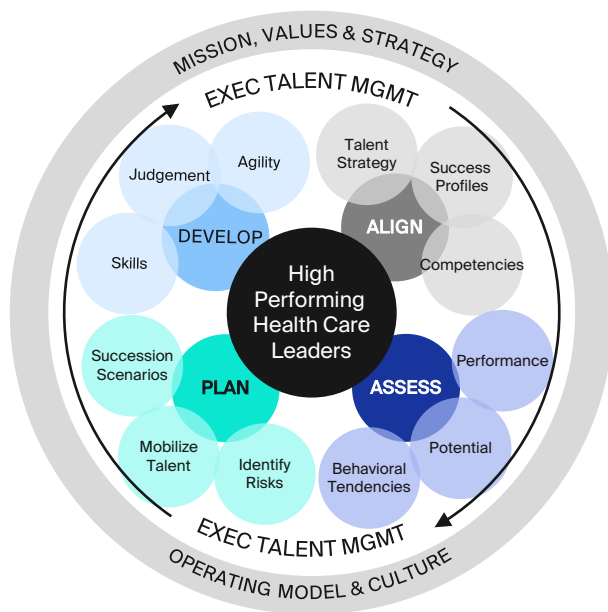
Business Impact

- Assessed **121 Directors and Vice Presidents** across the health system (Health System, Faculty Practice, and Children’s Hospital) using Hogan Assessments and the Talent Review Survey (tailored to their competencies)
- Conducted in-depth, **talent review discussions on 74 team members** with high growth potential
- **Held calibration sessions** to align performance, potential, readiness, and trajectory – across levels and departments
- **Built and implemented a dynamic dashboard** enabling executives to:
 - Identify high-potential talent by level, department, or discipline
 - Measure succession pipeline depth and identify risk points
 - Understand future succession scenarios based on talent readiness and career trajectories
- Identified **potential successors for all 20 critical leadership roles**, averaging three successors per role
- Developed **metrics and targets for Executive, VP, and Director successor readiness** to drive leadership development investments
- Designed a custom **Leadership Development Academy for the top 30 leaders**, ensuring they have the skills needed for future success
- **Scaled the talent review process and Leadership Academy** for broader application and replication in subsequent years

Approach

Lotis Blue partnered with the Health System CEO and CHRO to assess, design, and implement an integrated Executive Talent Management System aligned to the health system's future needs. Using a data-driven approach and scientifically validated tools, we:

- Defined critical leadership competencies, success profiles, and talent needs
- Assessed the performance and potential of 121 health system executives (Directors, VPs, and Executives)
- Implemented a robust succession planning and talent review process to identify bench strength risks and plan for future leadership needs
- Designed a leadership development program to accelerate performance and succession readiness



METHODOLOGY & DELIVERABLES

Align

- Conducted an assessment using Lotis Blue's HR Talent Management Capability AuditSM, identifying succession planning as a critical gap and business need
- Developed success profiles, outlining key accountabilities, goals, and competencies for 20 critical leadership roles
- Established leadership expectations and a standardized framework for evaluating leaders against six key dimensions of leadership performance and potential
- Designed a structured, five-phase succession planning program to guide the process from initiation to execution

Program Design Principles



Align with the Strategic Framework, Vision and Values: Support the core mission of delivering high-quality, world-class patient care by identifying and developing top leadership talent



Establish Shared Leadership Expectations: Ensure senior leaders have a common understanding of the traits that define exceptional performance and future leadership potential



Build a Strong Leadership Pipeline: Develop a deep bench of leaders prepared to step into critical roles now and in the future



Enhance Successor Visibility: Help current leaders understand talent depth, potential, and key risks to mitigate



Plan for the Future: Look two to three steps ahead to proactively manage leadership transitions beyond immediate replacements



Leverage Objective, Science-Based Assessments: Use scientifically validated tools and methods to assess leadership competencies and potential with consistency and reliability



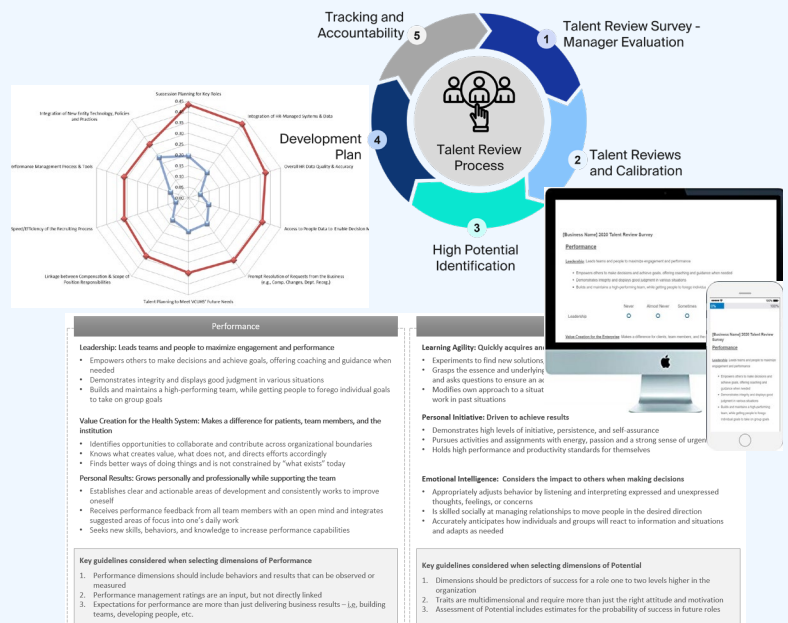
Prioritize Development: Provide the opportunities that develop current and future leaders using a 70/20/10 model - 70% challenge and stretch assignments, 20% mentoring and coaching, and 10% training and coursework



Enabled by HR and Led by the Business: Driven by leadership and facilitated by HR to ensure consistency in the process, criteria and equity in decision-making



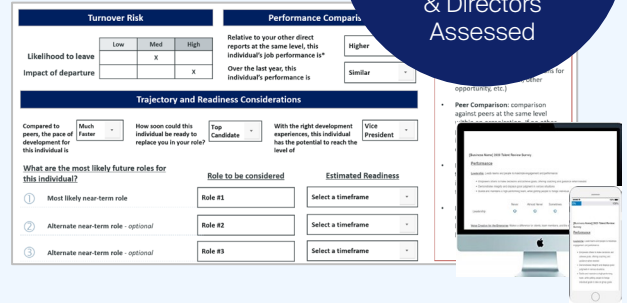
Keep it Simple but Rigorous: Maintain an intuitive, easy-to-execute process while upholding high standards of methodology and evaluation





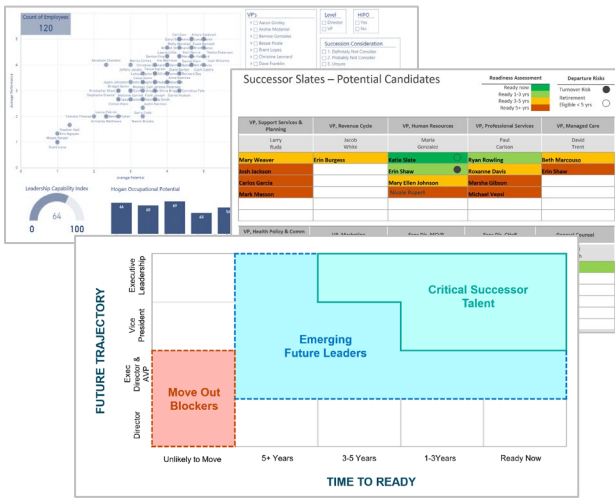
Assess

- Deployed Lotis Blue's Talent Review Survey to gather comprehensive feedback on 121 leaders, evaluating performance, potential, trajectory, future roles, and talent risks
- Administered the Hogan Leadership Assessment to identify key leadership strengths and stress-related behaviors affecting performance
- Provided individual debriefs and coaching for all Director-level and above leaders to support development and growth



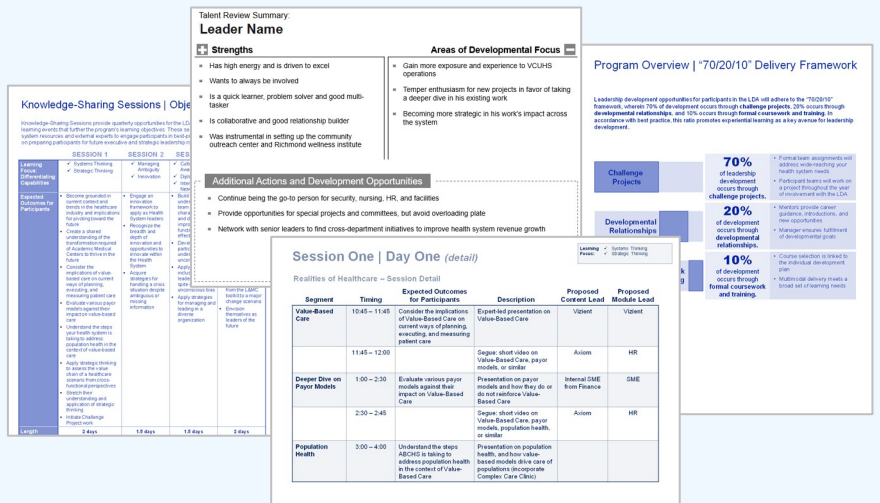
Plan

- Created a Board-level succession planning report, focusing on the Critical Successor Talent and Emerging Future Leaders talent portfolio
- Developed a dynamic dashboard to:
 - Capture individual talent scorecards for calibration discussions
 - Visualize bench strength, portfolio readiness, and risks at the role level and across the top four organizational levels
- Facilitated talent review sessions to calibrate performance, potential, and succession scenarios, leading to:
 - 61% of leaders identified as high-potential
 - All 20 key roles secured at least one successor, avg. 3 per role
 - Succession candidate slates with clear actions and investments



Develop

- Created tailored development plans for all Director and VP-level leaders to accelerate progress and drive accountability
- Designed and launched a customized Leadership Development Academy for the top 30 leaders, focusing on critical skills for the health system's future success, which the health system continues to deliver
- Created a process to identify and enroll high-potential, Director-level talent in a similar development program via the annual talent review process



Lotis Blue Consulting is a leader in strategy-driven organizational design, operational efficiency, and talent management. Joining SullivanCotter in 2024, we bring a data-fueled, behavioral science-driven approach to leadership, team, and organizational performance to leading health systems across the nation.

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