# Bench Building

A Simple, Powerful Process for
Strategic Talent Management

# Contents

## Introduction

Who are your organization's real up-and-comers? Who are your real key contributors? Are you confident right now that you are providing both groups the kind of meaningful opportunities for growth and development that will not only keep them, but allow them to deliver a maximal benefit to your organization? Do your very best people know their contributions are valued? If a key leader or technical person gets hit by the proverbial bus, do you have anyone ready to fill any of those roles?  And are you confronting the non-contributors, either to correct their problems or get them to move on?

Delivering solid answers to each of these crucial questions is what Bench Building is all about. The process delivers:

1. Leaders expanding capabilities for current or future contributions
2. Consensus for senior leadership on the relative current and potential contributions of leaders and technical contributors
3. Plans for either correcting performance problems or developing capabilities
4. Leaders receiving concrete demonstrations of the organization's estimation of their value

The fancy term for this process is "strategic talent management," but that makes it sound more complicated than it is. It's another one of those processes that successful companies use. Many good businesses know they should do it, but they don't know how. This book is going to show you how.

## Bench Building involves three main phases:

1. **Complete 9-Block and Succession Plan** to gain consensus about contributions and potential of leaders and key technical contributors
2. **Complete Development Plans** for leaders to correct problems and develop capabilities
3. **Oversee Implementation of Development Plans**

## Building Your Bench Building Process

Here are a few important considerations in kicking and sustaining your Bench Building process:

**Who gets included?** Typically it assesses leaders from below the owners to managers or even frontline supervisors); key individual contributors (e.g., senior sales people, senior engineers, other critical technical people); any high-potential people

(usually called "HiPos") not included in either of those groups. That's who we'll assume is part of your process as we explore Bench Building in this explanation, and refer to them collectively as "leaders. It could include additional groups, up to everyone in your organization, if you like.

**How frequently is it done?** This is best done as an annual process. While it seems like it would be a logical extension of Success Reviews, it's probably best if it's not completed around that time. Reviews are about a particular period and future development. Bench Building is about leaders' current and potential contributions to the organization, so it's best not to let results from the former overshadow the needs of the latter.

**Who is involved in the reviewing?** Bench Building is a great opportunity for managers to achieve a consensus around what the business values in leadership. Allowing as many as possible to participate will help them more effectively spot and nurture current and potential valued contributors, while inspiring them to improve their own leadership chops.

But you may have internal considerations that would make for too many awkward or even harmful discussions. You must weigh those realities against the benefits to your leadership. Perhaps you only include a level of leaders in discussions about people below them on the org chart. For example, directors can provide input on managers, supervisors, and individual contributors, but not VPs. Or it may make the most sense only to include your most senior leadership.

**Who gets a development plan as a result of this process?** All of your managers should be helping their people grow their capabilities to contribute. However, the organization should ensure that those identified as high contribution and/or high potential (on the 9-Block and/or the Succession Plan) are growing to help the organization as it needs. For those individuals, more formal development plans, formulated with input from Bench Building participants, are a good idea. At a minimum, these should be completed for those included on the Succession Plan. Other possibilities include HiPos and all those on the 9-Block's blue- and green-colored boxes.

**Who runs the process?** It would be great if your HR leader can facilitate the process (may be a developmental goal if that person is still too green). But otherwise, it should be a senior leader.

**How long does this usually take?** As you might imagine, both the 9-Block and Succession Plan may take an hour or more of discussion, especially for your first time. They could also require considerably less, especially after a year or two under your belt.
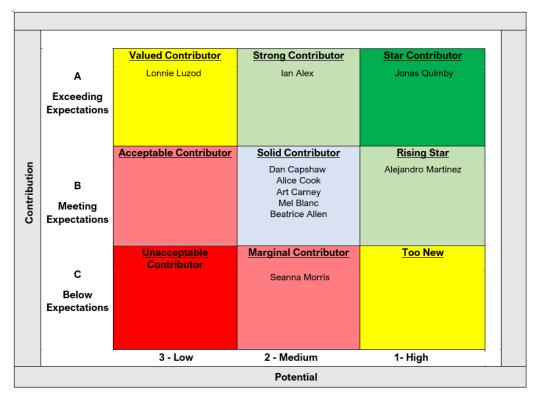
## Complete 9-Block and Succession Plan

### The 9-Block

Distinguishing your stars from your steady Eddies and your problem children, and everyone in between, starts with completing a 9-Block. It might be tempting just to categorize people according to their last success review or performance review, but Bench Building isn't just about determining relative contributors. It's about relative contribution and potential.

Your 9-Block gives you this easy-to-understand visual representation of the relative value of your most important people.

This is exactly what it sounds like it is—a 9-block matrix on which you'll enter names of your leaders and key individual contributors.

| Contribution | | 3 - Low | 2 - Medium | 1 - High |
|---|---|---|---|---|
| **A** Exceeding Expectations | | **Valued Contributor** Lonnie Luzod | **Strong Contributor** Ian Alex | **Star Contributor** Jonas Quimby |
| **B** Meeting Expectations | | **Acceptable Contributor** | **Solid Contributor** Dan Capshaw, Alice Cook, Art Carney, Mel Blanc, Beatrice Allen | **Rising Star** Alejandro Martinez |
| **C** Below Expectations | | **Unacceptable Contributor** | **Marginal Contributor** Seanna Morris | **Too New** |
| | | | **Potential** | |

9-Block

Notice that some boxes are empty, while others (especially B2) have several. That's fine.

Let's consider what the boxes mean. Note that the there are four colors-red, green, blue, and yellow. Red and green having two shades.

Let's consider the boxes by color.

**Green:**

**A1:** Best of your best. These are your must-keep people.

**A2:** High value contributors. Not stars, but what they deliver is more than "fully successful." Capable of expanded roles.

**B1:** Rookie of the Year contenders. New with the organization and delivering more than most do at this point.

**Blue:**

**B3:** Fully successful contributor. This is where most of your leaders will likely be. These people aren't "average:" they're delivering what you want, the way you want it. They should be considered for development and promotion opportunities.

**Yellow:**

**A3:** Topped out. Really glad these people are here, but they're in the role from which they're going to retire. Therefore, you're not going to consider these people for succession roles or invest in developing them beyond what they need in their current roles.

**C1:** Too new. As with A3s, you're glad they're with you; but they just got here and are still getting up to speed in their current roles, so you're not ready to consider them for future roles or make an above-normal investments in their development.

**Red:**

**C3:** Need terminated. Not a question of if, but when.

**B3:** On thin ice. These people's leaders need to decide whether these people are worth keeping. If not, start the process.

**C2:** Needs a performance improvement plan. Give these people the chance to fix their problems, or get them out.

Take a look at the distribution of leaders across your 9-Block. Key considerations:

Are you satisfied with your number and distribution of leader in green boxes (A2, A1, B1)?

If yes, are you providing them the compensation and developmental/career rewards likely to keep them?

If no, what changes in staffing and/or development should you make now to improve your team?

Do you have plans right now to confront those in the red boxes (B3, C3, C2)?

Is anyone in any of those boxes who was there last year? If yes, either you really want the person in a different box or you need to address the person's future employment.

As those people are being replaced, what steps will you take to ensure that their replacements will be fully successful contributors?

Once you have your initial 9-Block, you'll use it in the following year to consider what changes, if any, you'll make to the prior year's review.

Who has moved up/down, and why?

Who remains where they are, and why?

Where would you put people who have joined since the last review?

## Succession Plan

If you're a small or mid-size business, a succession plan may seem like a futile idea. Chances are you don't have successors for all or maybe even most of your senior leadership or key technical roles anyway, so who cares?

You should, for these reasons:

> Ensuring continuity in key leadership and technical roles is always a concern. Knowing which key positions lack potential successors is an invaluable consideration for recruiting and hiring.

> Identifying potential successors for various roles makes longer-term developmental activities clearer and more effective.

> Strong employees who know they're potential successors for a higher role have a better reason to stay with the organization.

Here's a sample Succession Plan:

**Year: 2026**

| POSITION | INCUMBENT | READY NOW | READY 1-2 YEARS | READY 3-5 YEARS |
|---|---|---|---|---|
| President | Keith Jagger | | | |
| Chief Financial Officer | Mick Watts | | | Paul Lennon |
| Chief Operations Officer | Charlie Wyman | | | |
| Engineering Director | Bill Richards | | Paul Lennon | |
| Sales Director | Chuck Leavell | | Pete Best | George McCartney |
| Senior Product Engineer | Pete Best | Ringo Harrison | | |
| Production Supervisor | John Starr | | | |

Succession Plan

Note that some positions have successors who could potentially fill more than one position. Most have no one internally. However, Identifying even these four successors provides senior leadership with a starting point to further develop some clearly valuable people.

Your plan should only include people whom you really do consider successors, not just those who "might" be right for the role.

Get specific for reasons. If ready 1-2 or 3-5 years, what are they missing that keeps them from being ready now? The answers will reveal development opportunities, which should be addressed on those people's development plans.

Here are some considerations about completing your 9-Block and Succession Plan:

**Less intuition, more reason.** Estimations about people, especially about something as abstract as "potential," almost always involves a level of "gut feel." But don't rely solely on intuition. Be sure your group has rational, explainable reasons for their judgments. Challenge consensus before adopting it. Why is the Star a star and not a Strong Contributor? Why aren't we just terminating the Marginal Contributor? Why isn't a particular longtime leader a Strong Contributor as opposed to a Solid Contributor? On the Succession Plan, why is a potential successor identified as a 1-2 year possibility, and not 3-5 years?

**Be honest.** You may want to call a Strong Contributor a Star because, well, you just hate seeing that box sit empty. By the same token, you may want to include people who "could" be potential successors, rather than only those who actually are potential successors. Get your group's best judgment, and complete these documents to show what your bench really looks like, not what you'd like it to be.

## Complete Development Plans

Your leaders should be helping all your people with their development; but your Bench Building review team should consider guiding how those identified as better contributors and/or high potential people could grow their capabilities toward ends considered particularly valuable to the organization. For those people, you will want to provide more consideration and guidance. For those people, a formal development plan is a good tool. (Though you can certainly use it for any people you like.)

Here's a sample plan:

# DEVELOPMENT PLAN

**Contributor Name: Bob Eubanks**

**Job Title: Engineering Director**

Date Created: 12/12/2025

| TARGET KEY BUSINESS / LEADER RESULT(S) | DEVELOPMENT OUTCOME | DEVELOPMENT PRODUCT | WHAT'S REQUIRED | CURRENT STATUS | NEXT STEP |
|---|---|---|---|---|---|
| 5% YOY revenue growth

1 additional application/year in a current customer | Improved prospecting effectiveness | Three reports to President & Sales Director on 3 active projects at current customers in which we may have opportunities | Develop relationships w/knowledgeable customer contacts; research customer activities (e.g., in news/on website) | 1 report submitted on Majestic turbine program | Arrange plant tour during Q1 visit to Madrigal |
| A timely, cost-effective new product development process that meets or exceeds customer requirements | Effective leadership in continuous improvement and cost reduction | Two new product submissions for 15% below average cost and lead time | Collaborate w/CFO to identify best cost opportunities; formulate and lead a CI project that delivers products | CFO collaborations identified best opportunity in new materials identification | Develop CI project w/engineers on reducing cost & time of materials selection |
| Effective, committed contributors | Professional, productive, conflict-free relationships between team members; zero complaints from those outside Engineering about department conflict impacting other's work | Documentation of coaching sessions with three engineers regarding their commitments to work together productively | Review with HR of coaching process and documentation; conduct each coaching session without involvement from HR | Reviewed coaching training | Prepare for each session; review preparations w/HR for input & approval |

**SUCCESS EVALUATION & COMMENTS:**

Development Plan

Let's look at what goes into a Development Plan activity by consider the one in the second row of our example:

**Target Key Business/Key Leader Result:** The Key Business Result (or Results) the Development Activity is intended to affect. What Key Business Result will the organization buy more/less of as a result of this activity? The second row targets identifies a Key Value Driver regarding a product development process that stands out from competitors.

**Development Outcome:** What do you want this person to improve? Rather than thinking of it in terms of skills, it's usually more helpful to identify the contribution in which you want to improve the person's effectiveness. In improving this company's product development process, senior leadership wants Bob to be more effective at leading continuous improvement projects that also deliver cost reductions.

**Development Product:** What will the person produce—put in your hand, leave on the desk or the wider world—to demonstrate greater effectiveness? Bob will need to bring two new products packages through his redesigned development process that are 15 percent faster than usual and 15 percent cheaper than the current average.

**What's Required:** A brief description of the activities you expect the person to undertake to produce the development product. Executive leadership wants Bob to work with the CFO to find what aspects of the current product development process have the best opportunities to reduce cost. Then, Bob has to assemble and lead a team of people to deliver the necessary cost reductions.

**Current Status:** Where progress stands right now; if nothing, it should show "not started." When completed, it should read "Completed [mm/dd/yyyy]." Bob is on it; the CFO has helped Bob identify that there are significant cost reduction opportunities in how the Engineering group identifies materials for new products.

**Next Step:** The next action that must be taken to achieve the goal. Bob's now going to formulate the project goal, assemble his team, and improve his materials identification process.

The two leftmost columns allow you to use the Development Plan as a progress tracker, periodically updating and helping the person stay on track.

Note that you can have a person pursue several different development activities in one year. For many people, one or two in a year should be sufficient. Unless at least some are completed sequentially, pursuing more than four in a year could simply dilute the activities' effectiveness.

Sources of development activities. Where do you find ideas to develop people? Here are some sources of development to consider:

- Business Plans. If a person is important to a current or upcoming initiative, how can the person improve to improve the likelihood of success?

- Success Map Reviews. What can a person deliver that would earn a greater contribution level in some element of his or her success map?

- Succession Plans. If a person is on the Plan but not in a "Ready Now" column, why not? Use the Development Plan to close that gap.

- Coaching conversations. If there have been concerns about effectiveness in some aspect of the job, a Plan could be an opportunity to close that gap.

- *FYI (For Your Improvement)* is a great book for managers looking for ideas on identifying employee development needs and defining activities to address those needs.

**Creating Effective Development Plans**

*"Never tell people how to do things. Tell them what to do and they will surprise you with their ingenuity."*

*—General George Patton*

**Focus on the outcome, not the "skill."** That sounds counterintuitive, but it's actually practical. Demonstrating a skill in one context doesn't guarantee one can apply the same skills expecting the same result in another context. A great basketball player may have amazing sprint speed and hand-eye coordination; it doesn't necessarily follow that he'd make a fabulous wide receiver.



If we define the outcome sought, people can often figure out for themselves what skills they have to develop to make that happen.

You can't necessarily "see" the skill; you can see what the skill produces. And what the skill produces is what the organization values. Don't get pulled into trying to define abstractions. Focus instead on helping people deliver what is valued.

**Try hard not to settle for training,** like "attend a finance class." If you want someone to acquire a new body of knowledge, define the Development Plan objective in terms of in what the person applies the knowledge.

Creating effective development plans can be a challenge at first, but they get better and easier over time. You can eventually build your own library of activities, from which people can adapt ideas for future plans.

## Oversee Development Plan Implementations

Once your plans are approved, leaders should be checking in periodically (roughly monthly, at least) to make sure people are progressing with their activities. If plan beneficiaries need help, managers should clear any roadblocks, provide guidance when necessary, and encouragement always.

Those in the plans should be encouraged to update activities roughly weekly, so that they can see their own progress.

### Other benefits of Bench Building

**It's a great developmental activity for senior leaders.** As with much else in life, the Bench Building journey is as valuable as the destination. Discussions about who's succeeding, who isn't, and what will be done about either are great vehicles for forging a shared consensus about what matters in the business and how to create it.

**Helps you become an employer of choice.** Senior-level attention identifying and helping grow  key players is a visible and engaging signal to current and future employees that your organization is sincerely committed to your people's growth and success.

Still have questions? Give us a call!

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