Fact sheet – Identifying critical role types

'Critical roles' are the different types of roles currently crucial to the achievement of organisational outcomes.

A vacancy in a critical role will have a significant tangible impact on the ability of the organisation to deliver outputs, achieve milestones, or meet budget requirements. In terms of succession risk, a lengthy vacancy, underperformance, or high turnover in a critical role are 'worst-case' scenarios.

As organisational focus and priorities shift, different types of roles may become more or less critical to current outcomes. A type of role identified today as 'critical' may not be so critical in the future. Indeed, roles identified today as critical, may not exist at all in the future.

As you undertake work to identify then describe types of critical roles in your organisation, you need to decide whether you are focusing on roles as they exist now and in the short term or roles that are yet to exist, but are likely to in the foreseeable future.

As such, focusing on critical accountabilities, rather than roles, may sometimes be a better approach. However, because 'roles' are more tangible than accountabilities, a focus on 'roles' is often more practical.

Identify types of critical roles in your organisation

There are many different criteria you may wish to use to identify the critical roles in your organisation. You need to decide which you will adopt for the purpose of your succession risk management activities:

Hierarchical level
For example:

- Senior Executive Officer level

- senior managers in a particular division

Internal relationships
For example roles with the greatest:

- span of control

- number of direct reports

- role in key operational process

External relationships
For example roles with the greatest:

- Ministerial contact

- cross-departmental relationships

- media interface

Specific capabilities
For example:

- leadership roles

- technical specialist roles

Specific accountabilities
For example:

- senior project managers

- lead officers on a major project.

Profiling types of critical roles

Once you have decided on the types of critical roles that will be the focus of your succession risk management efforts, you should profile each type of critical role in the following ways:

Work and performance expectations

- the principle accountabilities of the role and tasks performed

- key outputs/outcomes

- quality of performance

- speed with which performance needs to be reached following a new appointment

This helps to identify what is 'at stake' should a role of this type become vacant. This information helps determine the amount of effort that should be devoted to addressing the succession risks associated with it.

Challenges, support and attractions

- inherent and environmental difficulties of this type of role (for example, isolation, work load, stress)

- support that is readily available to assist people in the role to achieve and maintain performance and stay in the role

- inherent and environmental attractors (for example, career prospects, visibility, status)

This information will help identify how easy or difficult it will be to attract someone to the role and for them to stay and perform the role.

Capabilities required to succeed in the role
- technical or specialist skills/knowledge/abilities

- generic skills/knowledge/abilities

- personal attributes (such as the ability to learn and grow, adaptiveness, reliance, interpersonal skills)

Complexity and uniqueness

Consider the complexity of the role and whether it is unique both within the organisation and within other organisations and sectors. This helps identify how easy or difficult it will be to fill this type of critical role and the extent of which a new appointee may find it easy or difficult to achieve optimum performance in it. As such, this information helps determine the exposure to the three types of succession risk: vacancy, readiness and transition risk, and inform your mitigation strategies.

Intention of current incumbents

Consider whether or not particular critical roles are likely to become vacant in the near future. Indicators of a potential vacancy can come from:

- the current incumbent stating their intention to leave

- organisational change likely to create new critical roles

- trend data (such as historically high turnover in particular types of role or increased competitiveness of the labour market providing better employment opportunities elsewhere).

This information will inform the nature, focus and priority of your succession mitigation strategies in the short term.

It will also provide information to assess the readiness of your potential internal candidates.