Cornell's Center for Advanced Human Resource Studies

Targeted Benchmarking on Organization and Talent Planning Practices

Benchmark Completed in July 2026

CAHRS Partners have the opportunity to benchmark with other partner companies on HR topics of interest. The benchmarking is typically conducted with 5-7 other CAHRS Partners selected by the company that initiated the request. The CAHRS office identifies the appropriate connections at selected companies, and the benchmarking company then schedules 1:1 phone calls to explore their questions.

Examples of recent requests include: Sponsorship Initiatives, Organization Designs and Structures, Diversity Metrics, Talent Management Practices, Competency Models, and a variety of HR Policy Questions (e.g., Relocation, Cost of Living, Airline Mileage Usage).

CAHRS partners find this qualitative approach to benchmarking highly valuable for revealing novel insights and practices, as well as for building their networks. At the conclusion of the process, the benchmarking company shares an anonymized summary of its findings with the participating companies and CAHRS, who then make it available to all partners to benefit from the learning.

Overview

This summary synthesizes benchmarking findings from three large organizations across technology, industrial/building technologies, and financial services. The benchmarking focused on talent planning, succession planning, readiness, tools, analytics, and use of AI.

Participants (anonymized)

Company 1: Technology / Enterprise Services

Talent Planning

- Uses a structured 4-box talent review model across all levels.
- Talent assessment is tied to business outcomes and leadership behaviors.
- Has clearly defined role expectations and outcomes for nearly all roles.

Succession Planning

- Focuses succession planning on critical and revenue-generating roles rather than all executive roles.
- Requires talent profiles for Director-level and above employees.
- Uses readiness categories such as ready now, ready in 1–2 years, and ready in 3–5 years.
- Matches candidates to role profiles using data-based match scores.

Tools, AI, and Analytics

- Uses a major talent platform as the core system.
- Uses AI agents to answer succession planning questions and provide on-demand talent data.
- Uses AI nudges and development suggestions to support leaders.
- Has AI governance in place through an ethics review process.

Company 2: Industrial / Building Technologies

Talent Planning

- Uses a standard 9-box talent review process.
- Conducts talent reviews annually.
- Defines potential through aspiration, ability, and engagement.
- Uses talent pools for roles below Director level rather than formal succession plans.

Succession Planning

- Focuses formal succession planning on Director-level and above roles.
- Tracks succession risk and risk of loss.
- Emphasizes knowledge transfer for high-risk roles.
- Ensures high-potential employees are tied to at least one succession plan.
- Uses readiness categories including ready now, ready in 1–2 years, ready in 2–3 years, and emerging talent.

Tools, AI, and Analytics

- Uses Workday as the main HCM system.
- Uses Hogan assessments for pre-hire assessment.
- Is exploring additional assessment tools for development.
- Holds monthly people forums where leaders identify rising talent.

<u>Company 3: Financial Services / Payments</u>

Talent Planning

- Uses an enterprise talent platform to support talent processes for Director-level and above employees.
- Conducts talent reviews annually.
- Evaluates leadership potential, readiness, turnover risk, and impact of loss.
- Defines leadership potential using factors such as curiosity, agility, adaptation, and aspiration.

Succession Planning

- Focuses succession planning on VP-level and above roles.
- Conducts regional talent market reviews and cross-functional talent reviews.
- Uses readiness views that include lateral moves, upward moves, and developing moves.
- Expects high-potential employees to be included on at least one succession plan.

Tools, AI, and Analytics

- Uses Oracle to support talent processes.
- Creates a talent snapshot for each talent review.
- Talent snapshots include strengths, development needs, and an employee-written career statement.
- Tracks plan deployment and alignment between reported skills and demonstrated skills.

Common Themes Across Companies

1. Structured Talent Reviews Are Common
   All three organizations use formal talent review processes, though the models differ. Two use 9-box approaches, while one uses a 4-box model tied to business outcomes.

2. Succession Planning Is Focused on Key Roles
   Organizations are moving away from broad plan completion and focusing more on critical roles, senior roles, and roles with high business impact.

3. High-Potential Talent Needs Visibility
   Two organizations expect high-potential employees to be connected to at least one succession plan, helping ensure visibility and development.

4. Readiness Is Defined in Different Ways
   Readiness may be based on time, move type, or development stage. Examples include ready now, ready in 1–2 years, emerging talent, lateral move, and upward move.

5. Talent Data Is Becoming More Important
   Organizations are using talent profiles, role profiles, talent snapshots, skills data, and match scores to support better talent decisions.

6. AI Use Is Emerging
   AI use varies by organization. The most advanced example uses AI agents, nudges, on-demand reporting, and development suggestions.