

PEOPLE LEADERSHIP | CAPABILITY | SUCCESSION | PERFORMANCE

# Team Capability, Succession & Performance Framework

I built one system – a 94-sheet Excel ops command console – to answer the two questions every operations leader faces: can the team handle what we own today, and is it scalable for what we’ll need tomorrow? Capability, knowledge risk, succession, and individual performance are assessed together, so staffing and development decisions are determined by service dependency and evidence.

## ENVIRONMENT

Corporate IT operations team supporting a multi-state retail enterprise with ~280 stores, distribution centers, and design studios.

## MY ROLE

Designed the capability and performance models, assessed and coached a 28-person team, ran calibration, and created three in-house leadership development programs.

28

team members assessed on one calibrated model

5

weighted factors behind every talent decision

3

leadership programs created inside the team

68→84%

first-contact resolution as team capability grew

## TWO LENSES, ONE SYSTEM

### CAPABILITY LENS

Skills, bench strength, knowledge risk, and incident command readiness

### PERFORMANCE LENS

Achievement, impact, development, and calibrated ratings

### ONE SYSTEM

#### Development plans

Named actions and success evidence

#### Succession coverage

Ready-now and ready-later bench

#### Staffing decisions

Retain, develop, realign, or replace

#### Recognition

Sustained, evidenced results

- 01 Overview
- 02 Capability Model and Heatmap
- 03 Knowledge Risk and Succession

- 04 Performance and Development
- 05 Calibration, Decisions, and Programs

SECTION 02

# Capability Model and Heatmap

Each team member is rated from 1 to 5 across the technology domains the team owns. Ratings rest on calibrated evidence, and critical-service skills carry more weight than low-risk ones.

| DIMENSION                  | EVIDENCE REQUIRED                                                            |
|----------------------------|------------------------------------------------------------------------------|
| Technical capability       | Demonstrated proficiency across assigned technology domains                  |
| Service management         | Incident, Problem, Change, Request, Knowledge, SLA, and customer disciplines |
| Leadership readiness       | Decision-making, communication, coaching, ownership, and escalation judgment |
| Knowledge concentration    | Number and quality of trained alternates for each critical service           |
| Incident command readiness | Role depth, runbook knowledge, bridge execution, and recovery discipline     |
| Succession readiness       | Near-term and longer-term successor coverage for key responsibilities        |

## REPRESENTATIVE CAPABILITY HEATMAP

Synthetic data. Identifiers T01 to T08 are anonymized.

|       | Network | End-User Computing | ITSM Process | Identity and Access | Cloud and Infra | Incident Command | Vendor Mgmt |
|-------|---------|--------------------|--------------|---------------------|-----------------|------------------|-------------|
| T01   | 5       | 4                  | 3            | 2                   | 3               | 4                | 3           |
| T02   | 3       | 5                  | 4            | 3                   | 2               | 3                | 2           |
| T03   | 2       | 4                  | 5            | 3                   | 2               | 4                | 3           |
| T04   | 4       | 3                  | 2            | 5                   | 3               | 2                | 2           |
| T05   | 3       | 2                  | 3            | 2                   | 4               | 2                | 1           |
| T06   | 2       | 5                  | 4            | 2                   | 1               | 3                | 2           |
| T07   | 4       | 3                  | 3            | 3                   | 4               | 5                | 4           |
| T08   | 1       | 4                  | 3            | 2                   | 2               | 1                | 2           |
| Depth | 3       | 5                  | 3            | 1                   | 2               | 3                | 1           |

### READING THE MAP

The depth row counts people rated 4 or higher in each domain. Identity and access management (IAM) and vendor management each have only one strong practitioner, so they lead the cross-training plan before they become availability risks.

### SCALE

- 1

 awareness
- 2

 assisted
- 3

 independent
- 4

 advanced
- 5

 expert who teaches others

SECTION 03

# Knowledge Risk and Succession

People risk becomes service risk when a critical system depends on one person. The risk score rises with service criticality and falls with each trained, documented alternate. A service with no trained backup carries a fixed penalty that pushes it to the top of the list.

**High**

A critical service depends on one primary resource.

**RESPONSE**

Immediate cross-training, documentation, shadow coverage, and succession action.

**Moderate**

Alternate coverage is limited, or runbooks are incomplete.

**RESPONSE**

Planned cross-training and evidence-based readiness testing.

**Managed**

Multiple capable resources hold current documentation.

**RESPONSE**

Maintain through rotation, exercises, and periodic validation.

BENCH STRENGTH VIEW

Representative entries.

| CRITICAL RESPONSIBILITY             | COVERAGE                   | READINESS      | NEXT ACTION                                        |
|-------------------------------------|----------------------------|----------------|----------------------------------------------------|
| ServiceNow platform administration  | 1 primary, no alternate    | HIGH RISK      | Cross-train two analysts and run a runbook sprint. |
| Cloud and infrastructure operations | 1 primary, 1 partial       | MODERATE       | Pair on change windows for two quarters.           |
| Network operations lead             | 1 primary, 1 alternate     | READY IN 6 MO. | Shadow vendor escalations and on-call.             |
| Incident Commander rotation         | 3 qualified, 2 in training | MANAGED        | Quarterly simulation and live co-command.          |
| Endpoint engineering                | 1 primary, 2 alternates    | READY NOW      | Maintain the rotation and refresh the runbooks.    |

INCIDENT COMMAND READINESS

3/4

Incident Commander

2/3

Communications Lead

4/3

Bridge Scribe

2/2

Network Tech Lead

3/2

Endpoint Tech Lead

1/2

Vendor Liaison

Qualified people against the target depth for each major incident role. Synthetic data.

READINESS PRACTICES

- Major incident roles map to named primary and alternate resources.
- Runbooks are validated through exercises, with document review as a secondary check.
- Service dependencies set the order of cross-training.
- Workforce risk appears alongside service and vendor risk in operational reviews.

SECTION 04

# Performance and Development

I created a template in which reviews follow an A-SWOT structure, keeping feedback precise and tying every conversation to business impact.

**A**  
**Achievement**  
The work, its evidence, and its operational or business impact

**S**  
**Strength**  
Repeatable capabilities that lift team or service outcomes

**W**  
**Weakness**  
The specific capability or behavior that should change

**O**  
**Opportunity**  
Growth interests matched to practical assignments

**T**  
**Threat**  
Execution, workload, knowledge, or continuity risks

ACHIEVEMENT-TO-IMPACT TEST

|                                                           |                                                        |                                                                                            |                                                                        |                                                                         |
|-----------------------------------------------------------|--------------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------|-------------------------------------------------------------------------|
| <b>1 Contribution</b><br>What did the person actually do? | <b>2 Evidence</b><br>What objective proof supports it? | <b>3 Operational effect</b><br>What changed in quality, speed, reliability, cost, or risk? | <b>4 Team effect</b><br>Did knowledge, coverage, or execution improve? | <b>5 Sustainability</b><br>Can the result repeat without heroic effort? |
|-----------------------------------------------------------|--------------------------------------------------------|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------|-------------------------------------------------------------------------|

COACHING MODEL

- Strengths and development needs are discussed separately, so each message stays clear.
- The observed behavior is described first, followed by the desired change.
- Every development goal connects to business value, team performance, or career readiness.
- Evidence of success is defined at the start of the review period.
- Regular check-ins adjust the plan throughout the year.

REPRESENTATIVE DEVELOPMENT PLAN

| OBJECTIVE             | ACTION                                                                    | SUCCESS EVIDENCE                                             | TIMING   |
|-----------------------|---------------------------------------------------------------------------|--------------------------------------------------------------|----------|
| People leadership     | Complete structured leadership development and apply it through mentoring | Completion plus observed application in team support         | Year end |
| Sustainable execution | Adopt a measurable workload and time-management system                    | Improvement against the agreed workload measures             | Year end |
| AI integration        | Plan and lead a practical AI or automation use case                       | Implementation plan, adoption evidence, and outcome measures | Year end |

SECTION 05

# Calibration, Decisions, and Programs

Calibration keeps ratings consistent across managers. A weighted decision model turns ratings and capability data into clear staffing actions.

## CALIBRATION PRINCIPLES

- Evidence comes from the full review period.
- Ratings measure performance against the role expectations and outcomes.
- Sustained performance outweighs a single success.
- Unusually high or low ratings require a written rationale.
- Corrective feedback links to an expectation, a support plan, and a follow-up date.

## TALENT DECISION WEIGHTING



Technical capability, reliability, collaboration, learning agility, and leadership potential combine into a single score that informs managers' judgment and keeps decisions consistent across the team.

## DECISION OUTCOMES

**Retain**  
Strong performance and capability with a growth path in place

**Develop**  
Clear potential with named gaps and a funded plan

**Realign**  
A better fit for the person in another role or domain

**Replace**  
Sustained gaps after documented support and follow-up

## PROGRAMS I CREATED INSIDE THE TEAM

**Service Champions**, **Each-Teach**, and **Leadership Ladder** turned the framework into daily practice, giving team members visible ways to build capability, share knowledge, and prepare for larger roles.

## MANAGEMENT VALUE

Talent management becomes operational. The framework shows where people risk can turn into service risk, where succession coverage is credible, and where development investment will have the greatest effect on resilience and execution. It works for a five-person service desk and a multi-tier operations organization, because it measures dependency and evidence at any size.