Sequentia Methodology Brief

Succession readiness: how ready each person is for a target role

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1. Why this exists

Succession decisions answer one question: who can step into a critical role, and how soon. This brief documents how VIFM turns assessment evidence into a readiness estimate for a named target role, to inform succession and development planning, so a client can see exactly how the estimate is produced and where its limits are. It is one input to a succession discussion and is not, on its own, a basis for a promotion or appointment decision. It is written for HR and executive sponsors, not only for psychometricians. It sits alongside the Assessment Center and AI Readiness Compass methodology briefs.

2. Construct definitions

The framework. Readiness is measured against the VIFM behavioral competency framework: 4 domains (Thinking, Results, People, Self), 8 clusters, and 21 competencies, each scored on a 5-point behaviorally anchored scale (1 Significant Development Needed to 5 Significant Strength, with 3 Competent as the working bar). The framework is VIFM-authored and owned.

Two instruments, one framework. Two instruments measure the same 21 competencies, so a self view and an others view can be set side by side for each competency:

- a **behavioral self-assessment**, Persona (the candidate, first-person), and
- a **360**, Reflect 360 (manager, peer, direct-report, and other observers, third-person).

The two are collected on different response scales (Persona asks how far the person agrees with each statement; Reflect 360 asks how often the behavior is seen) and both are compared with a role target expressed on the proficiency scale, so differences between self, others and target are indicative and should be read as prompts for discussion, not as precise distances.

Earlier framework versions. Where Persona or 360 results were collected on the earlier version of the competency framework, each earlier competency is mapped to the current competency that replaced it, so those results are matched to a role profile built on the current 21 competencies.

3. Instrument development

Items. In Persona, each competency carries a small set of normative (Likert) items, some reverse-keyed to guard against acquiescence. A competency score is the mean of its items; clusters and

domains are means of their competencies.

Self versus observer. Persona and Reflect 360 are built on the same 21 competencies. Persona uses first-person statements; Reflect 360 uses observable behaviors written for raters. Each set was authored for its own perspective and both are linked to the same competency, so results can be compared competency by competency.

Rater design. A 360 for succession is normally set up with 4 to 6 raters across rater categories (a delivery guideline; the platform does not enforce a number), plus, in standalone use, the candidate. Ratings from peers, direct reports and other colleagues are only used once at least three people in total from those groups (the anonymity threshold, three by default) have rated a competency; with one or two, the combined others rating for that competency is withheld. When Persona and the 360 are combined for one person, the readiness calculation takes the self view from Persona only; a self-rating given inside the 360 is not used for readiness.

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4. The readiness model

Others drive the tier. The readiness tier is driven by the 360 Others view: the combined ratings of the people who work with the person. These are observer reports, not measured performance. They draw on more than one viewpoint and are less exposed to self-enhancement than a self-rating, but they remain subject to rater bias (leniency, halo, limited opportunity to observe), so the tier is an indication of how others see the person against the target level, not an objective measurement of it. When a 360 is available, the self-assessment never moves the tier; it is differenced against Others to surface self-awareness (over-rating, under-rating, blind spots, hidden strengths), which informs development, not the tier.

Persona-only mode. Where no 360 has been set up for a person, the platform can still produce a readiness tier from that person's Persona self-ratings, measured against the same target role profile with the same thresholds and guardrails. In this mode the readiness report marks the result as self-reported, the self-versus-others comparison and the rater-agreement flag are not available, and the tier is indicative only: it should be confirmed with a 360 or an Assessment Center before it informs a succession decision.

Gap to the role, not an absolute. Readiness is the distance between the candidate's weighted Others profile and the **target role profile**: the role's critical competencies, each weighted by importance, benchmarked to the role's target proficiency. Competencies the role does not require do not dilute the result.

Tiers. The weighted gap maps to four tiers: Ready Now (at or above the bar), Ready Soon (just short), Developing (moderate gaps), Not Ready (substantial gaps). An optional year-horizon layer (for example 0 to 2 years, 3 to 5 years) can be switched on; it is a presentation label derived from the tier, not a measured quantity, and is deliberately separated from the math to avoid implying false precision.

The tiers are advisory. They summarize the evidence collected against a role profile whose competencies, weights, priorities and target levels are agreed with the client before use; they are one input to a succession discussion and do not replace the judgment of the people making the decision. With the default settings, Ready Now means the weighted rating is at or above the weighted role target,

Ready Soon means it is up to 0.5 of a scale point below, Developing up to 1.0 point below, and Not Ready more than 1.0 point below. These cut-offs are defaults, not validated standards. The year horizons (by default 0 to 2 years, 1 to 3 years, 3 to 5 years, and beyond 5 years) are labels attached to a tier; they are not forecasts of when a person will be ready, and the default ranges overlap.

Guardrails. A high-priority "knockout" caps the tier when a must-have competency sits well below target, so a strong average cannot mask a shortfall in an essential competency. A coverage floor returns "Insufficient Data" rather than a tier when too few competencies were rated. With the default settings a competency counts as rated when at least one observer has rated it, and a tier is given when at least 70% of the role's competencies are rated. A tier can therefore rest on a small number of raters, in the limit on the manager alone. The readiness report states how many observers each tier rests on, and we advise at least three observers before a tier informs a succession decision. Advisory flags mark borderline cases (a gap sitting on a tier boundary) and low rater agreement (rater groups, such as manager, peers and direct reports, differing sharply in their average ratings), so near-calls and inconsistent evidence are visible rather than hidden behind a clean label.

Tunability. Every tier threshold, the knockout rule, the coverage floor, the advisory bands, and the year labels are configurable by a VIFM administrator without code changes. The settings are held as one set of platform defaults, so a change applies to every client; they are not set separately for each client.

9-box placement. The readiness report also places the person on a nine-box grid. The performance axis is the average rating on the role's Results and People competencies; the potential axis is the average on its Thinking and Self competencies (where a domain has no rated competency, that axis uses the overall weighted rating). Each axis is banded low (below 2.5), medium (2.5 to below 3.5) or high (3.5 and above). The grid is a way of presenting the same ratings; it adds no new evidence, and the potential axis is a rating of current behavior in those two domains, not a measurement of future potential.

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5. Validity

Content validity. The target role profile is intended to be built through job analysis with the client (for example critical-incident interviews and a competency card-sort with role-holders and their leaders) and reviewed by subject-matter experts. Where that work has not been done for a client, the role profile is provisional and should be presented as provisional when results are shared.

Construct validity. The self and 360 measure the same competencies, allowing convergence and self-other discrepancy to be examined. The four-domain structure separates performance-facing (Results, People) from potential-facing (Thinking, Self) capability, consistent with the talent-map axes.

Criterion validity. The standard to which readiness aspires is prediction of subsequent role success. That evidence is accumulated over time against promotion and performance outcomes; it is not claimed from design alone.

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6. Reliability

Internal consistency. Multi-item competency scales allow per-scale reliability (Cronbach's alpha) once a response sample exists.

Inter-rater reliability. The 360 uses multiple raters per competency; agreement is monitored, and sharp disagreement is surfaced as a low-agreement flag rather than averaged away.

Stability. Re-assessment over time supports test-retest checks and tracks development between cycles.

Current status. None of these coefficients has been calculated yet for the instruments Sequentia combines; they will be reported as response numbers allow.

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7. Reference frameworks and standards

The methodology was designed with reference to established assessment standards: the *Standards for Educational and Psychological Testing* (AERA, APA, NCME); ISO 10667 (assessment service delivery); and the ITC Guidelines (test use, and test adaptation and translation, relevant to the bilingual English and Arabic delivery). Commercial competency frameworks may be cited as benchmarks the model was compared against, never as sources it was drawn from. Alignment is VIFM's own mapping against the published standard or law; it is not a certification, accreditation, audit or legal opinion by the body concerned. VIFM does not claim certification against, or an independent audit of conformity with, any of these standards.

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8. Limitations and disclosures

- Readiness is an evidence-based estimate, not a guarantee of future performance.
- A tier is only as good as its two inputs: the target role profile, which is specific to the client, and the threshold settings, which are platform defaults. The role profile requires the client's sign-off and the client should review the thresholds before use; defaults are a starting point, not a finding.
- Year horizons are an HR-facing convention, not a measured time-to-ready.
- Validity and local norms are earned through job analysis and outcome studies; design and clean authorship reduce risk but are not a substitute for that evidence.
- 360 ratings carry rater bias; the model mitigates this with multiple raters, anonymity thresholds, and agreement flags, but cannot eliminate it.
- A tier produced in Persona-only mode rests on self-report alone, is indicative only, and is weaker evidence than a tier driven by a 360; it should be confirmed with a 360 or an Assessment Center before it informs a decision.

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9. Update cadence and contact

Reviewed each assessment cycle and whenever the framework, item bank, or thresholds change. Questions and calibration requests: VIFM Assessment Center.

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10. Reliability and validity evidence

Two kinds of evidence: **(A)** established coefficients for the *methods* combined here, from the published literature; and **(B)** VIFM's own reliability procedures and their current status. Sequentia has no items of

its own - it is a weighted computation over Persona (self) and Reflect 360 (others) against a target role - so it inherits the evidence of those instruments.

A. Established coefficients for the methods (published literature)

- **Self-other agreement** (Persona self vs Reflect 360 others): meta-analytic **ρ ≈ .35** (Harris & Schaubroeck, 1988) - the gap between self and others is the informative signal.
- **Self-report and performance (published research on a different kind of instrument):** meta-analyses of Five-Factor personality questionnaires report modest relationships with job performance (Barrick, Mount & Judge, 2001). Persona is a competency self-assessment, not a Five-Factor personality questionnaire, so these findings are background on self-report in general and are not validity evidence for Persona or for Sequentia.
- **Potential identification:** combining performance, behavior and role-fit follows the applied potential / succession literature (Silzer & Church, 2009).

B. VIFM's own reliability - method, threshold, and current status

- **Reliability of the inputs:** Sequentia adds no questions of its own, so its reliability depends on the instruments it combines. Internal consistency for Persona and Reflect 360 (Cronbach's alpha, target .70 or above) will be reported per competency once enough completed sittings have accumulated; it has not yet been measured.
- **Convergent design:** triangulating a self-view, an others-view and an explicit role target strengthens a single-source inference.
- **Status:** a development-planning signal, not a selection decision. Predictive validity (does a readiness tier predict a successful transition?) is not claimed pending a local longitudinal study.
