

SUCCESSION PLANNING WORKSHEET

Strategies:

- Identify key players within the organization who may be retiring soon or looking for promotion.
- Identify talent within the organization to replace those individuals. If no one within the organization work to identify someone external.
- Review workflows and practices to ensure proper documentation is in place if someone were to leave.
- Determine how often to repeat this exercise (annually, biannually etc).

1. What level of the organization are we focusing on first? Why? Are there other levels that need to be reviewed as well?

2. Are there people in positions that may have the characteristics to succeed in positions that may soon be vacant but need further development? Identify potential career development courses and paths to help grow those individuals to be ready to step into the role. Be sure to discuss this with the plan with the individual.

3. Review your plan and any execution. Did it work? What could have been done differently? Does anyone have relationships within the industry to help identify individuals externally?

“One of the things we often miss in succession planning is that it should be gradual and thoughtful, with lots of sharing of information and knowledge and perspective, so that it’s almost a non-event when it happens.” - Anne M Mulcahy