

Succession planning worksheet

Assess your organization’s succession planning needs. Use this tool when just getting started, or annually to review and update.

- 1. List all of the positions by title for the team or group in question, such as a senior leadership team, or the management team of a department or unit. Be sure to list every position involved, even if that position is currently unfilled.
- 2. For each position, complete the information requested in columns 1 through 6, using the criteria in the key below.
- 3. In the far right column, assign a succession planning priority for each position, looking particularly at succession planning situations that are more immediate.
 - For example, if your VP of Sales, Jane Smith, is (B) likely to retire within three years, and you assign a (1) for Criticality and 'High' for Vulnerability, but there are no staff ready to take that position now or within the next 1-2 years, then you would likely conclude that addressing succession planning for Jane Smith is a High Priority.

	1	2	3	4	5	6	Assessment
Position title	Incumbent name	Retirement status	Criticality	Vulnerability	Number of staff ready now	Number of staff ready in 1-2 years	Succession planning priority (Med/High)

Retirement Status:
 A – Retirement likely within one year
 B – Retirement likely within three years
 C – Retirement eligible within five years

Criticality:
 1 – Successor must hit the ground running
 2 – Successor fully functional within six months

Vulnerability:
 High – Loss of incumbent likely to cause significant business setback
 Medium – Loss of incumbent likely to cause moderate business setback