Succession Planning Template

## 1. Assessment

**Identify Critical Positions**
List the roles essential for the company's success.

Position/Role: \_\_\_\_\_\_\_\_\_\_\_

Current Incumbent: \_\_\_\_\_\_\_\_\_\_\_

**Evaluate Requirements**
Analyze the skills and competencies needed for these roles.

Skills Required: \_\_\_\_\_\_\_\_\_\_\_

Competencies: \_\_\_\_\_\_\_\_\_\_\_

**Risk Assessment**
Identify positions with the highest vacancy risks.

Position Risk Level: High/Medium/Low

Potential Impact: \_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Position/Role | Current Incumbent | Skills Required | Competencies | Position Risk Level | Potential Impact |
|  |  |  |  | High/Medium Low |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## 2. Evaluation

**Select High-Potential Employees**
Choose employees with the ability and potential to fill critical roles.

Potential Successor: \_\_\_\_\_\_\_\_\_\_\_

**Competency Models**
Develop models outlining the necessary skills for future leaders.

Competency Model Details: \_\_\_\_\_\_\_\_\_\_\_

**Gap Analysis**
Identify gaps between current skills and future requirements.

Skill Gaps: \_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Successor Candidate | Skills & Competencies | Development Needs | Competencies | Position Risk Level | Potential Impact |
|  |  |  |  | Ready/Not |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

## 3. Development

**Knowledge Capture**
Document key knowledge held by current leaders.

Key Knowledge: \_\_\_\_\_\_\_\_\_\_\_

**Development Programs**
Create career development plans, including training, mentoring, and special projects.

Training Programs: \_\_\_\_\_\_\_\_\_\_\_

Mentoring Opportunities: \_\_\_\_\_\_\_\_\_\_\_

**Handover Documentation**
Ensure all contextual tasks and responsibilities are well-documented.

Handover Checklist: \_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Successor Candidate | Development Activity | Timeline | Competencies | Responsible Person |
|  |  |  |  | Mentor/Supervisor |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

## 4. Implementation and Monitoring

**Action Plans**
Develop clear action plans for transitioning roles.

Action Steps: \_\_\_\_\_\_\_\_\_\_\_

Responsible Party: \_\_\_\_\_\_\_\_\_\_\_

**Regular Reviews**
Schedule regular reviews to update the plan and assess progress.

Review Schedule: \_\_\_\_\_\_\_\_\_\_\_

**Feedback Mechanisms**
Implement feedback systems to continuously improve the plan.

Feedback Methods: \_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Action Step | Responsible Part | Timeline | Review Schedule | Feedback Method |
|  |  |  |  |  |
|  |  |  |  |  |
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## **Succession Plan Approval and Sign-off**

## **Approved by:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
| Approver’s Name |  | Approver’s Title |  | Approval Date |
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