

# Succession Planning

*"The times, they are a changin'"*

Bob Dylan



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## **Worksheet for Succession Planning**

### **1. Start with your Mission and Vision**

- What kind of talent does your organization need to achieve its mission and grow into the future?

### **2. Assess Your Team**

- Define gaps where people may leave the organization within the next 5 years

### **3. Skill and Capabilities**

- What skills and capabilities are needed for these roles?
- Develop a clear understanding of the capabilities required to undertake those roles

### **4. Potential Employees**

- Define employees for potential replacement into upcoming roles
- Post job descriptions for upcoming jobs
- Managers to make recommendations

### **5. Development Plans**

Prepare employees to be ready for advancement into each identified role.

- Work with the retiring employee in defining the job skills/abilities needed.  
Consider a task list of what the employee does:
  - What do you do every day?
  - What do you do once a week/when?
  - What do you do monthly? Quarterly? Annually?
- Define a development plan – what does the employee need to learn/do to advance
- Consider incentives
- Build in how retiring employee can mentor
- How to measure success

**Succession planning unfolds in two ways:**

- On an annual basis, each manager will identify key positions that may be at risk of vacancy within the next 3-5 years
- Each manager will also discuss with staff during the annual performance review the employees' interest in and potential for future leadership roles

# Employee Development Worksheet

<b>Developmental Action Steps</b> Tasks to be learned, relationships to be developed, mentoring, etc.	<b>Timeframe</b> Date to be completed	<b>Measurement/Notes</b> Measure success