

Is your succession plan designed to deliver?

Use this SuccessionPlayBook Planning Checklist to gauge the strength of your succession planning process and to diagnose areas for improvement.

Executive Sponsorship

- Does your CEO prioritize and support your succession planning initiative?
- Does the entire leadership team champion succession planning?

Process

- Do you use a clearly defined succession process?
- Is your process easy to understand?
- Have you formally documented the process?
- Is the process consistently used across all levels of the organization?

Crucial Conversations

- Have leaders developed skills and maturity to have candid discussions with candidates regarding readiness and development needs?
- Do leaders have the tools and training to support development discussions with their teams?
- Do you have frank conversations with leadership on their plans for retirement?

Do you socialize the plan and consistently report on progress with:

- ...the board (if applicable)?
- ...management?
- ...individual succession candidates?

Supportive Structures

- Do your leaders receive the training and skill building they need for succession planning and candidate development?
- Do you provide feedback and coaching to improve succession planning and candidate development?
- Have you formally documented and shared your succession plan?
- Do you have an inclusive annual plan review that invites course correction based on new data and strategic direction?
- Is the succession plan updated annually?
- Does everyone consistently use the same worksheets and tools to guide succession planning?

Does your succession plan:

- ...identify business critical leadership roles and success profiles for each one?
- ...focus on developing pools of talent for each role versus identifying sole candidates?
- ...build development plans for each succession candidate through a co-creative process with that candidate?
- ...define metrics to track progress and assess the plan's effectiveness?

Accountability

- Does your succession plan specify drivers, timelines, and deliverables?
- Do you have a process in place to hold participants accountable that they understand and have committed to?

Future Focused

- Is your succession plan aligned with the organization's long-term strategic plan?
- Does your plan aim to build complementary teams across multiple levels of leadership (not just the CEO)?
- Have you aligned recruitment, hiring, and development efforts with your succession plan to cultivate a robust talent pipeline?

Your Score

- 0-10** At risk for business disruptions
- 11-15** Indicates need for improvement
- 16-22** Solid foundation with room to grow
- 23-27** Strong plan, minor tune-up needed

Regardless of your score above, our team can help. Our SuccessionPlayBook public and private workshops, and consulting engagements offer the right-sized approach based on your needs and budget. Call us to learn more.