

Succession Planning Checklist

Is Your Succession Plan Setup For Success?

	YES	NO
EXECUTIVE SUPPORT		
Is your Succession Planning initiative supported by your CEO?		
Is Succession supported by the entire leadership team?		
PROCESS		
Do you use a proven Succession Process?		
Is that process easy to understand?		
Are you confident in your ability to explain the process at all levels of the organization?		
COMMUNICATION		
Are you consistently communicating the plan to		
• The Board (if applicable)		
• Management		
• Individual succession candidates		
• All members of the organization		
Do you have formal conversations with leadership on their plans for retirement?		
Are leaders prepared to have candid discussions with their team regarding each candidate's readiness?		
Do leaders have the right tools to support development discussions with their successors?		
DOCUMENTATION		
Is your Succession Plan formally documented?		
Does the leadership team review the Succession Plan (at least) annually?		
Is your Succession Plan updated (at least) annually?		

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DOCUMENTATION (continued)		
Does your Succession Plan include:		
• Detailed Success Profiles for each leadership role?		
• Populated Succession Benches for each leadership profile?		
• Successor Profiles for each Succession Candidate?		
• Development Plans for each Succession Candidate?		
• Documented metrics to gauge the success of your plan?		
ACCOUNTABILITY		
Does your plan include detailed timelines and deliverables?		
Do you have a process in place to hold participants accountable?		
Do you have a scheduled annual review that includes your entire leadership team?		
Are leaders prepared to have candid discussions with their team regarding each candidate's readiness?		
Do leaders have the right tools to support development discussions with their successors?		
THE LONG GAME		
Is the Succession Plan aligned with the organization's Long-term Strategic Plan?		
Is there a plan in place for multiple levels of the organization (i.e. not just the CEO)?		
Are recruitment, hiring, and talent development aligned with your Succession Plan?		
Are Success Profiles built with the future in mind?		
Are you focused on developing pools of talent for each role vs. identifying one successor?		
	TOTAL	
# of yes answers <div> 0 to 10 At risk for unexpected disruptions 15 to 23 Solid foundation with room to grow </div> <div> 11 to 15 Demonstrates need for improvement 24 to 31 Mature plan with minor adjustments needed </div>		