

Succession Planning Consultant Checklist



Selecting a Succession Planning Consultant can be a challenging task. Make the right choice for your organization by using the following checklist to evaluate potential consultants.

Process

- Do they have a formal plan that outlines each step of the process?
- Can they provide an estimated timeline for each step?
- Does their plan include the use of scientifically-validated assessments?
- Are their assessments tailored to capture the unique characteristics of each role?
- Do they integrate the results of the assessments throughout the succession plan?
- Will they deliver a succession plan that is customized for implementation within your organization?

Support Services

- Do their services include support throughout the implementation of your plan?
- Do they offer executive coaching services?
- Are there templates that are easy for you to use?
- Is there a library of resources that you can review if you have questions about a specific topic?
- Do they provide guides or workbooks that can be used to supplement your succession planning process?
- Are their offerings clear and accessible, allowing you to evaluate the quality of their work?

Experience

- Are they an authority on the topic of succession (e.g., avidly write on the topic, frequently post videos or deliver presentations to various stakeholders)?
- Are they well-established in their industry?
- Do they have demonstrated abilities in leadership coaching?
- Do they have team members who are formally trained in the use of scientifically-validated assessments?
- Do they have experience working with companies in your industry?
- Do they have experience working with companies of various sizes?

Your Score

- 15–18** Consultants with high scores demonstrate a proven process that is thoroughly supported with helpful resources and expertise. They should be considered a valuable partner in your succession planning process.
- 9–14** Score indicates consultant may meet some of the requirements but be deficient in other areas. Consider asking for references or testimonials from past clients to gather more information.
- 0–8** We recommend avoiding consultants who fail to meet at least half of the criteria listed above.

Ready to get started? SIGMA offers a variety of Succession consulting services including our [Launch Series](#), which delivers a custom succession plan to your senior leadership team in just 4 to 6 weeks. For more information, [contact us today](#).