

Training on Succession Planning



Exercise #1: Identifying vulnerable positions

1. Identify 5 positions in your organization that you'd like to start succession planning for:
 - a.
 - b.
 - c.
 - d.
 - e.
2. Write them in the chart below
3. **Think:** Are there positions currently preparing employees to temporarily fill those positions if they were to become vacant tomorrow?
4. **Think:** If the people in potential successor positions are not ready to step up right now, how soon are they likely to be ready?
5. **Write** the names of people in potential successor positions in your chart, using the boxes indicating whether they're ready now, will be ready in 1-3 years, or will be ready in 4 years or more.

FUNCTIONAL AREA	Management	Management	Human Resources	Facilities	Programming	Marketing / Outreach
POSITION						
Current Incumbent						
Tentative Turnover Date (if known)						
Ready Now						
Ready in 1-3 years						
Ready in 4+ years						
Color Key						
Position with successor ready now						
Position with successor ready in 1-3 years						
Position with successor ready in more than 3 years						
No successors identified						

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Exercise #2: Establish eligibility criteria

Think about the position you want succession planning. What qualities make a successful position.

1. What is the knowledge the position requires ?

2. What are the skills the position requires? (hard and soft skill)

3. What the abilities the position requires?

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Exercise #3: Identifying a talent pipeline

1. List three duties (major functions) that the feeder and successor positions share:
 - a.
 - b.
 - c.

2. List three tasks and day-to-day experiences that the feeder and successor positions have in common
 - a.
 - b.
 - c.

3. List the three greatest differences between the two positions
 - a.
 - b.
 - c.

4. List three ways the feeder position prepares a person to grow into the successor position
 - a.

Training on Succession Planning



b.

c.

Exercise #4: Create an action Plan to prepare successors

1. Creating a succession development plan with training and learning opportunities that are aligned with the successor position.

A. Participating in the functional areas of the incumbent's role, especially areas outside of the incumbent's current experience.

Plan:

B. Mentoring from the incumbent.

Plan:

C. Providing coaching opportunities.

Plan:

D. Acting for the incumbent while they are away from work.

Plan:

E. Working on special projects or opportunities to stretch skills into aligned areas.

Plan:

F. Dual incumbency opportunities when the incumbent transitions out of their role.

Plan: