

# SUCCESSION PLANNING STARTER KIT

## Starter Kit Includes:

- CEO Succession Plan
- Key Employee Development
- Workforce Talent Matrix

# CEO SUCCESSION PLAN

CEOs and Business Owners must prepare for their succession years in advance. Without preparation your business may risk devaluation or survival after your departure. Start by analyzing your role first.

## CEO ROLES & RESPONSIBILITIES

Exit Target Date: \_\_\_\_\_

Rank by impact to business	Responsibility	Reason for having responsibility? P=Passion US-Unique Skill/Strength C=Control O=Other (ex-plain)	% of time spent	Who could this be transferred to today or in future?	How would this responsibility be transferred? And how long would it take to transfer?

# KEY EMPLOYEE ASSESSMENT

"Strong human capital processes are critical to a company going through change. One of the most important processes is assessing key employees' potential and how they will fit into your future strategic plans."

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Current Age: \_\_\_\_\_

Age at CEO target exit date: \_\_\_\_\_

*Attach Job Responsibility and Accountability Description  
Attach Professional Development Plan*

Current Job Performance (0-10): \_\_\_\_\_  
*See Workforce Talent Assessment Matrix*

Advancement Potential (0-10): \_\_\_\_\_  
*See Workforce Talent Assessment Matrix*

Desire to be an owner:  Yes  No  Unclear

Desire to be CEO:  Yes  No  Unclear

Ability to be CEO :  Now  In X Years  Never  
*See Position Analysis Worksheet*

# TALENT MANAGEMENT ASSESSMENT

“An organization that is obsessed with developing their talent will out-perform their competitors who don’t.”

	STATEMENT	YES/NO
ORGANIZATION	Talent development is part of the strategic plan.	
	Developing employees to their full potential is a core value of the company.	
	A strategic workforce plan is developed in conjunction with the business strategy.	
INDIVIDUAL	A written plan for development is created annually for each employee.	
	Employees have input into their development plan.	
	Employee are responsible for their professional development.	
	Development goals are clearly written with defined outcomes, specific time frames and metrics	
	Development plans are reviewed at least 4 times a year.	

LEADERSHIP	The CEO/President understand how to build a world-class executive team.	
	The CEO/President looks for opportunities to delegate authority that are appropriate for developing other direct reports.	
	The CEO/President is responsible for developing his/her people.	
	The executive team conducts self-audits annually.	
	The CEO/President coaches his/her direct reports.	
<b>TOTAL 'YES'</b>		

### Self-Scoring

Less than 5 =

Seriously deficient in talent development, unsustainable model

6 – 9 =

talent development practices need major improvement to retain employee

10 – 13 =

talent development practices need improvement to retain employees

14+ =

talent development is superior



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