

# KEY ROLE IDENTIFICATION

## **Directions**

This worksheet is designed to be used by a company's Succession Planning Team. The Succession Planning Team should consist of the Executive Team and a representative from Human Resources. You will need your Strategic Plan and Organizational Chart to reference during Key Role Identification. Once you have successfully identified your Key Roles, you can start the process of evaluating employees currently in the roles and create development plans for them.

## **For companies with less than fifty employees**

The Succession Planning Team should list all current positions having direct reports, and positions reporting directly to the CEO/President regardless of direct reports. List any additional leadership positions and/or positions requiring specialized knowledge which will be added to your organization based on your business plan.

Then rate each position for the seven criteria. Ratings should be 1 = none, 2 = minor, 3 = neutral, 4 = moderate, 5 = major. The total score will provide you with a ranking of key roles. The higher the rating the more key the position is to your company's success.

## **For companies greater than fifty employees**

Follow the steps above and then add this next step: Managers of individual contributors should evaluate each direct report position using the same criteria and then review their results with the Succession Planning team. The list from the Succession Planning team and the list(s) from managers are combined to create one list to rank all positions.

All companies should review job descriptions to ensure they are current and include core competencies. Current job descriptions will be necessary to define gaps in competencies, skills, and knowledge that will be addressed in individual development plans.

