

SUCCESSION PLANNING CHECKLIST

To be used with *Replaceable*, the book

PREPARE PHASE

1. Create Succession Planning Team
 - Ask the seven questions to choose the right people for your team
 - Conduct a launch meeting and create a team charter
 - Define roles and responsibilities for team members
 - Communicate to the company your succession planning initiative
2. Assess Readiness
 - Complete the *Succession Planning Assessment* with the team, using the five questions
 - Create list of projects to support succession planning
 - Integrate projects into business plan
 - As business owner, ask the six questions to determine if you're ready to step aside

IDENTIFY PHASE

3. Key Positions
 - Create Future Organizational Chart
 - Complete the *Key Role Identification Worksheet*
 - On *Organizational Succession Planning Roadmap*, fill in Key Position title and Held By rows in each column
 - Update Key Position Job Descriptions
4. Competencies
 - Identify employee behaviors supporting company values
 - Identify leadership behaviors driving organizational success
 - Create two competency ladders, one for all employees and another for leaders
 - Update job profiles by incorporating competencies into job profiles
 - Review future strategy to determine additional competencies to support your company's future success
 - Rate employees on each competency and behavior using your competency ladders

5. Potential

- Conduct career conversations
- Define potential using the attributes: aspiration, capability, and engagement
- Complete the *High Potential Identification Worksheet*
- Train managers on how to identify high potentials
- Communicate to your high potentials why they have been chosen and your expectations of them.

ANALYZE PHASE

6. Assess Your Talent Pool

- Conduct a Talent Conversation
- Complete the *Talent Pool Review*
- Place each employee in one of the nine boxes on the *9-Box Grid*
- Complete the *Organizational Succession Planning Roadmap* started in step 3.

7. Analyze Competency Gaps

- Revisit your two competency ladders
- Complete the *Employee Competency Assessment*
- Conduct 360° Assessments if appropriate
- Interview Feedback partners
- Conduct Performance Conversations

DEVELOP PHASE

8. Development Plans

- Complete the *12-month Development Plan* for employees
- Conduct a Development Conversation for each employee
- Ask the four questions when deciding on methods of development
- Train managers on how to coach employees
- Track employee development progress

RECRUIT PHASE

9. Hiring Great People

- Complete *Hiring Checkup List*
- Identify key positions which have no internal successors identified using your completed *Organization Succession Planning Roadmap*
- Attract quality candidates by using the three techniques
- Use the *Interview Process Checklist* before interviews to ensure consistency
- Avoid the eight common hiring mistakes
- Embrace the Behavioral Interview process
- Create behavioral interview questions to consistently ask candidates
- Use the *Shortlisting Interview Score Card* to assist in hiring decisions

RECOGNIZE PHASE

10. Measuring Progress

- Move candidates up the *Organizational Succession Planning Roadmap* as they develop
- Measure development based on success metrics in development plan
- Hold Bi-annual Talent Pool Conversations and replot employees on the 9-Box Grid as they develop
- Have quarterly conversations with employees to review development progress
- Use succession planning metrics to measure your planning effectiveness.
- Measure implementation of each phase of the process using the *Succession Planning Checklist*

11. Recognizing Success

- Align your rewards and recognition program to your values and culture
- Recognize both individual and team success
- Customize rewards and recognition based on employees wants and needs by asking the five questions
- Evaluate your program by asking the seven questions