

Succession Planning

Succession planning is the process of identifying the essential positions within your organisation and developing action plans for people to assume those positions. It requires taking a holistic approach of the current and future goals; this process ensures that you have the right hires in the right jobs today and in the future.

To create an effective succession planning process please find the template you can leverage to prepare for unplanned or planned individuals departure. Use the outline below to create a thorough plan, for temporary or permanent employee changes. This template includes sections for detailed processes and communication planning. It also includes a section to closely examine the roles of employees and the attendant responsibilities that need to be addressed. The five critical steps involved in this process are outlined below:

- 1. Identify the significant organizational challenges that are likely to happen in the next 1- 5 years.**
- 2. Identify critical positions that will be in demand to support the business continuity.**
- 3. Identify skills, competencies and institutional knowledge that are critical success factors**
- 4. Identify high potential employee**
- 5. Develop a career development plan workshee**

Step 1: Identify the significant organizational challenges that are likely to happen in the next 1- 5 years.

Conduct an environmental scan using the worksheet.

Participants:

Date:

What is happening internally in your organisation and externally which affects/has the potential to affect the business?

Current happening?	In the near future?	In the long haul?

Step 2: Identify critical positions that will be in demand to support the business continuity.

At this step you're expected to review positions at the director level and determine the key positions taking into consideration individual contributor positions that require a particular competency or skill set, that are difficult to recruit for or have a high attrition rate.

Position title:

Position payroll title:

Position status (Tick the right box)

Filled	Vacant
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Position impact (Tick the right box)

High	Medium	Low
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Assessment of "Position Impact" should be based on a prioritized list of the department/organisation's mission, goals, objectives and strategic plan.

Vacancy risk (Tick the right box)

High	Medium
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Assessment of "Vacancy Risk" should be based on factors such as the incumbent's retirement eligibility, marketability, etc.

Step 3: Identify skills, competencies and institutional knowledge that are critical success factors.

Once you have identified positions that are mission critical and have significant vacancy risk, also identify skills, competencies and institutional knowledge that are critical success factors for every individual position that requires a succession plan.

Critical success factors template

Position title:

Position payroll title:

Education:

Work Experiences:

Tick the box that applies to the individual

Core competencies	Technical competencies
Strategic planning	Project Management
Communication	Legal compliance
Managing Change	Computer system & Technology
Customer centricity	Human resources management
Continuously improving quality	Budget and fiscal management

Other skills:

Identify unique institutional knowledge or relationships

State the unique institutional knowledge or relationships that are inherent to the success of this position?

Identify any other individual in the organisation with this knowledge and include the individual \s name.

How critical is it that this knowledge is documented and shared?

Tick the box that is suitable

High	Medium	Low
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Plan for a knowledge sharing session

Step 4: Identify high potential employee

Name:	
Position Title:	
Unit:	
Years in current position:	
Current manager/supervisor:	
Target position:	
Target position key competencies:	

Tick the suitable box

Ready:

High	Medium	Medium	Low
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Describe your action plan:

Step 4: Develop a career development plan worksheet (to be completed by the identified employee).

Name:	
Position Title:	
Unit:	
Supervisor Name:	
Supervisor title:	

Describe your long term goals

What are your career goals over the next 3-5 years?

Describe how your long term goals fits in the goals and priority of your department

Describe your short term goals

What are your career goals for the next 2-3 years?

Describe how your short term goals fits in the goals and priority of your department

State the skill and competency requirement

What skill set or competencies do you require to reach your goals?

Identify skill or competences to be developed	State the Training activities	State the target date	Define the associated costs	Describe the results

Employees signature & date

Supervisor signature & date

Before embarking on a career development discussion or collaborating on the Career Development Plan Worksheet, managers should prepare by executing the following actions:

1. Identify employee’s career goals
2. Note the realistic ones and confirm compatibility with the organizational goals and objectives.
3. Describe actions the employee has concluded so far and state how successful they were
4. Identify the areas you think employees should develop and refine their skills
5. Outline the additional skills or competencies the employee should focus on developing.
6. State resources, experience or training you can provide to help them reach their goals.
7. Highlight any additional knowledge, certification, or education the employee requires to acquire.
8. Identify the shift in current priority or workload you can accommodate to ensure the employee has bandwidth to achieve development.

If you need to discuss how best to address the talent and skills gaps in your organisation to achieve business objectives, please feel free to schedule a call with us at hello@staffingandco.com.