

Succession Planning Guide For Key Role Owners

Candidate Selection & Pool Health

Select your candidates and their readiness level i.e. **Ready Now, Ready Soon, Ready Later**. Your HR team has established criteria around the minimum number of candidates required for each readiness level, for your key role. This will determine the Pool Health of your key role.



No minimums met



At least 1 minimum met



All 3 minimums met

Skills & Leadership Match



On a scale of 0-100%, please assess the candidates for your succession plan on their skills and leadership match as it relates to their candidacy for **this** Key Role, not the role that they are currently in.

HR Red Flag

It is important that your HR team review your list as they may red flag a candidate in your succession plan. Please discuss any details and decide whether this disqualifies that individual from your candidate pool.

Interest and Willingness to Relocate

Assess the interest level of your candidates for this particular succession plan. In addition, and depending on your Key Role, relocation may be required of the candidate. It is important to communicate this to your candidates and understand if they have any restrictions.

Create a Development Plan

When creating a development plan for each of your candidates, we recommend 3-7 tasks that are time bound and specific to get your candidate Ready Now for this Key Role. Common categories of tasks include: jobs, projects, mentorship and courses.

Contingency Planning

In the event that you do not have any candidates that are Ready Now, it's highly recommended to have a supplemental contingency plan to your main succession plan. Identify 3-5 key tasks in your current role and select team members that are capable of completing those individual tasks. Contingency planning is meant to fill a temporary void when a key role becomes empty and until such time that it is filled.

Flight Risk

Identify the flight risk for each candidate i.e. likelihood that this employee will leave your company.



Low Risk

Employee doesn't show any signs of wanting to leave the organization.



Medium Risk

Employee shows signs of leaving the organization in the next 6-12 months. These signs can include but are not limited to: lack of motivation, drop in productivity, disengagement from their team, and taking more time off than usual.



High Risk

Employee shows signs of leaving the organization in the next 3-6 months. These signs can include but are not limited to: showing frustration with team members, issues with their compensation/performance, or a significant change in the delivery of their work product.