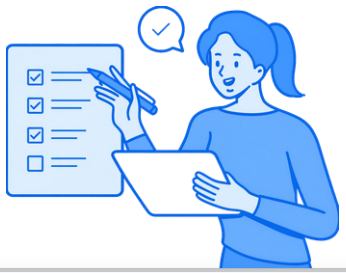
SuccessionHR

Succession Planning in Excel vs. SuccessionHR

Excel is a familiar starting point for succession planning. It can help organizations document critical roles, identify potential successors, and organize readiness assessments.

But as succession programs expand, keeping information current, coordinating input from business leaders, tracking development, and identifying leadership risk can become increasingly time-consuming.

SuccessionHR brings these activities together in one purpose-built platform, helping organizations move from tracking succession plans to actively managing leadership readiness and reducing risk.



Where Spreadsheets Start to Fall Short

Capability	SuccessionHR	Excel
Key role and successor management — Keep critical roles, succession candidates, readiness assessments, and development plans connected in one place.	✓	Limited
Leadership risk visibility — Identify roles without adequate succession coverage or Ready Now candidates before vacancies occur.	✓	Limited
Successor readiness tracking — Monitor candidate readiness over time to understand who's progressing and where gaps remain.	✓	Limited
Candidate development management — Assign development tasks, track completion, and understand how development activities contribute to successor readiness.	✓	Limited
HR and business leader collaboration — Involve Key Role Owners directly in succession planning with clear responsibilities and structured workflows.	✓	Manual
Talent intelligence and discovery — Explore skills, competencies, potential, and talent grids to identify and develop future leaders.	✓	Limited
Measuring succession outcomes — Track internal promotions, readiness progression, and leadership development effectiveness.	✓	Limited
Executive reporting — Access dashboards and insights into leadership risk, bench strength, and succession progress.	✓	Custom Setup
Workflow automation — Streamline surveys, reminders, follow-ups, and routine succession planning activities.	✓	Additional Setup
HRIS integration — Connect succession planning with existing HR data through supported integrations, or operate as a standalone solution.	✓	Custom Setup

Where Excel Genuinely Wins

Capability	SuccessionHR	Excel
Costs nothing extra — If Excel is already included in your software licenses, there may be no additional subscription to start tracking plans.	Additional investment	✓
No new procurement process — Get started without selecting a new vendor or completing another software approval process.	Requires procurement	✓
Make it your own — Add columns, invent a rating scale, and reorganize your workbook whenever you need to.	Configurable platform	✓
Everyone knows the basics — Most HR teams already know Excel well enough to manage simple lists and updates.	Some onboarding	✓
Works offline — Access locally stored workbooks without an internet connection.	Internet required	✓
Enough for a simple program — A handful of critical roles, one owner, and basic annual reviews may not justify dedicated software yet.	More functionality than needed	✓

A note on this comparison: *Excel is a flexible tool, and a well-built workbook can support many of these capabilities through formulas, custom configurations, and Microsoft 365 features. That's why we've used "Limited" in this Guide rather than "No" where applicable. The key difference is that SuccessionHR provides purpose-built functionality without the same level of manual setup and ongoing maintenance.*

Capabilities may vary depending on Excel configuration, additional tools, and SuccessionHR setup or integration availability.

When Is It Time to Move Beyond Excel?

Spreadsheets can be a practical starting point for succession planning. But as your organization grows and your succession process becomes more involved, the time spent maintaining those spreadsheets can start to outweigh their convenience.

Stick with Excel when...

- **You're only managing a handful of critical roles.** One person owns the spreadsheet, and keeping the information current is relatively straightforward.
- **Your succession planning process is still taking shape.** Your immediate priority is identifying key roles and documenting potential successors.
- **You only review your plans occasionally.** Annual updates are enough for your current needs, and there's little coordination required between stakeholders.
- **Your reporting needs are simple.** A list of key roles, potential successors, and basic readiness assessments gives leadership the information they need.

A spreadsheet that your team actively maintains can be a sensible place to start.

SuccessionHR

Consider SuccessionHR when...

- **Keeping succession plans current is becoming a full-time task.** You're spending more time collecting updates, consolidating spreadsheets, and preparing reports than acting on the information.
- **You can't easily see where leadership risks exist.** It's difficult to identify which critical roles lack ready successors or where your leadership bench needs attention.
- **Business leaders need to be more involved.** Succession planning depends on input from multiple departments, but HR is responsible for chasing updates and keeping everyone aligned.
- **Development plans aren't translating into measurable progress.** You're tracking activities, but can't easily tell which candidates are becoming more prepared for future roles.
- **You need to demonstrate the impact of succession planning.** Leadership wants to understand bench strength, internal mobility, readiness progression, and the results of development investments.
- **Your succession process needs to scale.** More key roles, candidates, and stakeholders make it increasingly difficult to maintain a consistent approach across the organization.

Dedicated succession planning software becomes more valuable when maintaining the process starts to take time away from improving it.

Purpose-Built for Succession. Designed to Maximize Talent.

SuccessionHR is purpose-built to help organizations strengthen leadership continuity, maximize internal talent, and measure the impact of their succession planning efforts.

Whether you're building your first formal succession program or looking to improve an established process, SuccessionHR provides the structure, visibility, and insights needed to make succession planning more effective.

Ready to move beyond spreadsheets?

See how SuccessionHR can help you spend less time managing succession planning data and more time preparing your future leaders.

Book a Demo

