

## FINDING OUR WAY TOOL

# SUCCESSION PLANNING CHECKLIST

### 7 STEPS FOR EFFECTIVE SUCCESSION PLANNING

- ① INITIATE THE CONVERSATION
- ② DON'T PUT OFF THE HARD STUFF
- ③ IDENTIFY POTENTIAL SUCCESSORS
- ④ BUILD IN TIME FOR RETREAT
- ⑤ NOTICE YOUR FEARS
- ⑥ CREATE AN EMERGENCY SUCCESSION PLAN
- ⑦ REGULARLY EMPOWER YOUR SUCCESSORS

**1** **Initiate the conversation:**  
If you haven't already, begin the conversation about succession planning with a small group of trusted advisers. We are all only interim in our roles, so let's normalize the conversation and the reality that one day, we will all transition. State your desire for the organization to thrive after your inevitable departure.

**2** **Don't put off the hard stuff:**  
If your successor entered your role tomorrow, what would need to be cleaned up for them today? Consider any staffing or organizational processes that may merit review. What would need to happen to make sure they are set up for success?

**3** **Identify potential successors:**  
Identify people who could do your job well and who you believe fit the profile of a successful leader. Review the names annually and pray for those who come after you.

#### TOP 5 POTENTIAL SUCCESSORS

☐☐☐☐

#### KEY GROWTH AREAS FOR EACH SUCCESSOR

☐☐☐☐

#### PRAYER FOR YOUR SUCCESSOR

## FINDING OUR WAY TOOL

# SUCCESSION PLANNING CHECKLIST

- 4** **Build in time for retreat:**  
Consider going away for a 24-hour retreat at least once a year. As part of the retreat, spend time surrendering your position to God and asking for clarity on whether it might be time to consider a transition.

MY NEXT RETREAT DATE: \_\_\_\_\_

- 5** **Notice your fears:**  
Make a list of the fears you have when you think about your transition. After writing your list, find biblical truths to combat each fear as they relate to your identity and calling. Share the list with close friends or family and allow them to speak into each item you named.

FEARS AND CONCERNS:


PROMISES IN SCRIPTURE:


- 6** **Create or review an emergency succession plan:**  
In the event of a sudden departure, clarify and communicate with key stakeholders who steps in as an interim leader.

EMERGENCY INTERIM LEADER: \_\_\_\_\_

- 7** **Regularly empower your successors:**  
Find ways to regularly share opportunities with potential successors to help them grow and develop into your leadership role. Consider creating an annual plan of tasks or opportunities you could give away to growing leaders. Refer back to the key growth areas you identified in step 3.

MONTHLY AREAS OF FOCUS FOR POTENTIAL SUCCESSORS

JAN	FEB	MAR	APR	MAY	JUN
JUL	AUG	SEP	OCT	NOV	DEC