Simple Succession Planning Template

Instructions:

1. Determine the specific job title, current position holder, and the timeline for succession planning.
2. List key competencies required for the role, identify potential succession candidates, and rate their readiness.
3. Outline a development plan for candidates, set performance metrics and KPIs, and establish a monitoring process.

Position for succession	Current position holder	Succession planning timeline	Key competencies	Succession candidates	Readiness rating	Succession development plan	Performance metrics and KPIs	Type of performance monitoring	Emergency contact
The specific position or job title the succession plan is intended for.	The person currently occupying the role covered by the succession plan.	The timeline for identifying, assessing and preparing candidates for the position.	The essential skills and qualifications needed for the position.	Individuals who may be strong candidates for the position	A rating system (0-10) to assess each candidate's readiness for the role, considering factors like qualifications, experience, skills, current performance, & development plan.	The steps to be implemented to develop the candidates' skills and prepare them for the position.	Key metrics that define success in the role and guide development planning for potential successors.	The process for tracking candidates' progress, and offering feedback and coaching as necessary.	The designated contact person or group for emergencies.
Human Resources Analyst III	Jane Doe	12-18 months	HR knowledge, communication, project management, problem-solving, ownership	Human Resources Analyst II	7/10 Ready with development	Lead a complex HR project, shadow higher-level work, strengthen presentation, consultation & project leadership skills.	Project deadlines, accuracy of analysis, customer service, independent handling of projects	Quarterly check-ins, project milestone reviews, feedback from partners	Division Manager
Administrative Services Manager	John Doe Mary Smith	18-24 months	Leadership. budget/fiscal knowledge, strategic planning, decision-making	Administrative Services Analyst II	5/10 Developing	Lead a department-wide project, gain budget experience, shadow manager meetings, develop leadership skills	Budget accuracy, quality/timeliness of reports, operational improvements	Monthly supervisor check-ins, quarterly development reviews, project milestone tracking	Division Manager