

**CORVUS
PEOPLE**



SUCCESSION PLANNING TEMPLATE

**A GUIDE TO IDENTIFYING AND DEVELOPING FUTURE
LEADERS WITHIN YOUR ORGANISATION**



GETTING STARTED

Succession planning in organisations is a strategic process that involves identifying, developing, and preparing employees to assume key roles within the company when current employees, particularly those in leadership or critical positions, leave their roles due to retirement, promotion, or other reasons. The primary goal of succession planning is to ensure a smooth and effective transition in key positions and to maintain organisational continuity and performance.

WHY USE A SUCCESSION PLAN TEMPLATE

Purpose

Understand that a succession plan is vital for identifying and developing future leaders within your organisation.

Succession Planning Benefits

Realise that effective succession planning ensures a smooth transition when key roles become vacant, minimises disruptions, and fosters organisational continuity.

HOW TO USE THE SUCCESSION PLAN TEMPLATE:

Review the Template

Carefully review the template to understand its sections, fields, and the information it requires.

Identify Key Roles

Determine which roles within your team or department are critical for its smooth operation. These are the positions you'll be planning for.

Identify Potential Candidates

Based on your knowledge of your team, list potential candidates for each of the key roles. Consider their skills, experience, and potential for growth. Enter this information into the template.

Assess Skill Gaps

Evaluate the skill gaps of each potential candidate. Determine what additional skills or experience they might need to be ready for the role.

Set Development Plans

Create individual development plans for each potential candidate to address their skill gaps. Be specific about the steps, training, or experiences required for development.

Monitor Progress

Regularly review the progress of potential candidates in their development plans.

Ensure they are on track and offer support or make adjustments as necessary.

Document Feedback

Use the template to document feedback, assessments, and achievements of potential candidates. Documenting their journey helps in making informed decisions.

Update Regularly

Keep the succession plan template updated as changes occur within your team. This includes adding new potential candidates, updating progress, and noting changes in skill gaps.

Be Proactive

Continuously identify and nurture talent within your team. Encourage open communication with potential candidates about their career aspirations and development.

Review and Adjust

Periodically review the entire succession plan with your team. Make adjustments as needed to ensure it remains aligned with your department's goals.

Utilise the Plan

When a key role becomes vacant or a leadership opportunity arises, use the succession plan to identify the best-suited candidate.

Provide Feedback

Offer feedback to potential candidates who are not selected for leadership roles. Use this as an opportunity to discuss their development and growth within the organisation.

Succession planning is not only about preparing for leadership transitions but also about creating a talent pipeline that benefits the organisation in various ways. It helps in retaining top talent, increasing employee engagement, fostering a culture of continuous learning and development, and ensuring the organisation remains resilient in the face of change.

SUCCESSION PLANNING TEMPLATE

TEAM NAME:	
DIVISION/DIRECTORATE/SERVICE NAME:	
DATE OF COMPLETION:	
DATE OF NEXT REVIEW:	

OTHER COMMENTS / SUCCESSION DISCUSSIONS

	ROLE 1	ROLE 2	ROLE 3	ROLE 4	ROLE 5	ROLE 6
POSITION						
CURRENT INCUMBENT						
LEAVING DATE (IF APPLICABLE)						
NUMBER OF DIRECT REPORTS						
TEMPORARY/SHORT-TERM COVER						
READY NOW						
READY IN 6 - 12 MONTHS						
READY IN 1 - 2 YEARS						
READY IN 2+ YEARS						
CONTENT IN CURRENT ROLE OR NOT APPLICABLE						

CORVUS PEOPLE

GET IN TOUCH TODAY

We hope this you have found this resource useful. For more information on Corvus People, or for a consultation with one of our advisors, please contact us at hello@corvuspeople.com.



corvuspeople.com



[@CorvusPeople](https://www.linkedin.com/company/corvuspeople)



[@CorvusPeople](https://www.instagram.com/corvuspeople)