**Succession Planning Approach: Things to Consider**

1. Sample flow chart identifying the steps in the succession planning process.



1. A sample form that can be used to collect information from employees in order to determine their suitability to fill the organization’s upcoming vacancies.

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| **Employee Information** |
| Name:       |
| Title:       |
| Job Classification:       |
| Length of Service:       |
| Time in Current Job:       |
| Current Supervisor:       |
| **Career Goals** |
| 1 to 3 Years:       |
| 3 to 5 Years:       |
| Beyond 5 Years:  |
| **Educational History** |
| Institution:       | Degree:       | Area of Study:       | Years:       |
| Institution:       | Degree:       | Area of Study:       | Years:       |
| Institution:       | Degree:       | Area of Study:       | Years:       |
| **Special Skills/Expertise** |
| Languages:       |
| Technology:       |
| Professional Expertise:       |
| Other:       |
| **Developmental Experiences - Past 3 Years** |
| Formal Training:       | Competencies/Skills Developed:       |
| Special Assignments:       | Competencies/Skills Developed:       |
| Other:       | Competencies/Skills Developed:       |

Adapted from Byham, William C., Audrey B. Smith, Matthew J. Paese. 2002. *Grow Your Own Leaders. Acceleration Pools: A New Method of Succession Management*. Upper Saddle River, NJ: Prentice-Hall Inc.

1. Determine how the identified employees will be evaluated to determine those that are best suited to fill the vacancies.

**Tactic: A combination of selection activities that could include an interview and/or an in-basket exercise.**

1. How will the most qualified employees be transitioned into the respective vacancies.

**Tactic: Identified employees could job shadow the current incumbents until their retirement. Job shadowing could be on a part-time or a full-time basis.**

1. How will the lesser qualified employees be dealt with by the organization.

**Tactic: Senior management could prepare these employees to fill future internal vacancies by discussing areas of improvement that they need to work on and develop a performance improvement plan to help monitor their progress.**

1. What follow up activities will the organization undergo to monitor the progress of all identified employees.

**Tactic: All employees will receive performance evaluations on either an annual or semi-annual basis.**