

Succession Scheduling Tool

adapted from *Who Comes Next* by Mary C. Kelly, PHD and Merideth E. Powell, MBA

Some items are self-explanatory; others are explained in *Who Comes Next*

Succession Planning Task	Measureable Goal	Start Date	Action Assigned	Team Member	Date Complete (or ongoing)
Assemble planning team					
Clarify vision					
Assess bench strength					
Calculate turnover rates					
Identify critical roles for succession					
Determine retirement eligibility for key leaders					
Select planning model					
Create org chart and evaluate structure					
Develop skills criteria					
Design leader avatar					
Engage employees for feedback about careers					
Design talent pathways					
Create contingency plans					
Analyze HR inventory to determine outside needs					
Recruit and hire					
Streamline onboarding					
Train and develop					
Coach and mentor					
improve engagement and accountability					
Communicate succession information					
Manage transitions					
Meet periodically with team to monitor progress and update plan					