**SAMPLE SUCCESSION PLANNING TEMPLATE**

|  |  |
| --- | --- |
| 1. **Objective** | Define the purpose of the succession plan (e.g., preparing for leadership transitions, ensuring business continuity, etc.). |

|  |
| --- |
| 1. **Key Roles** Identify the critical roles within the organization that require succession planning. |
| * **Role 1: [Job Title]** |
| * **Role 2: [Job Title]** |
| * **Role 3: [Job Title]** |

|  |  |
| --- | --- |
| 1. **Successor Candidates** List potential internal and external candidates for each key role. | |
| * **Role 1: [Job Title]** | * + Candidate A   + Candidate B |
| * **Role 2: [Job Title]** | * + Candidate A   + Candidate B |
| * **Role 3: [Job Title]** | * + Candidate A   + Candidate B |

|  |
| --- |
| 1. **Training and Development** Outline the development plans to prepare successors for their roles. |
| * **Candidate A**: Development goals, courses, mentorship. |
| * **Candidate B**: Coaching, cross-training, leadership workshops. |

|  |
| --- |
| 1. **Timeline** Define when transitions are expected and key milestones. |
| * **Immediate (0-1 year)** |
| * **Short-term (1-3 years)** |
| * **Long-term (3+ years)** |

|  |  |
| --- | --- |
| 1. **Contingency Plans** | Develop alternate strategies in case a planned successor is unavailable or not ready. |

|  |  |
| --- | --- |
| 1. **Evaluation and Review** | Schedule regular evaluations (quarterly, annually) to adjust the plan as necessary. |