

# Explanation of the Steps in the Succession Planning Process

- 1 Succession Planning is designed to identify and develop leadership that will create and execute a successful business strategy and will create/maintain the desired culture as well as provide a seamless transition in the leadership of the organization.
- 2 The organization's leadership identifies the "Key Positions" in the organization that need to be included in the succession planning process.
- 3 The organization's leadership creates the essential documentation for the key positions identified in #2 (e.g., Job Description, Competencies, Characteristics, Performance Ratings, Experience, Certifications)
- 4 The committee responsible for succession planning oversees a process to identify nominees for the successor slots for the organization's key positions.
- 5 The succession planning committee assembles the critical documentation for the nominees in the process (Resume, Career Plan, Assessment Summary, etc.)
- 6 The succession planning committee conducts the talent review process generating the outputs identified in the next step
- 7 Succession planning outputs include: (a) putting successors in order; (b) identifying current "readiness to move up; (c) specifying strengths and challenges; and (d) identifying specific development needs for each successor.
- 8 The succession planning committee documents the results of the review process which provides a database and records for use in future reviews.
- 9 The succession planning committee oversees the communication of supplemental development plan recommendations to the successors named in the plan and identifies who is accountable for support and oversight.