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Simplify your succession strategy:

SUCCESSION PLANNING TEMPLATES





In the modern world of business, one thing is certain: Change is inevitable. And as organizations evolve, so do their leadership needs.

To be on top of these changes, it's vital to have a plan.

This is where **succession planning** steps into the spotlight. It's not merely a human resources protocol—it's a strategic imperative.

Without a well-considered succession plan in place, organizations can find themselves in precarious positions when key leaders leave unexpectedly, or critical roles remain vacant. This not only disrupts day-to-day operations, but can also cast a shadow of uncertainty over the entire organization.

This guide delves into the pivotal role of **succession planning in HR** with key examples you're likely to come across.

Plus, you can download all of our **succession planning templates** for free by clicking the links below each example.

So, let's embark on this journey to demonstrate how thoughtful succession planning isn't just a safety net, but a blueprint for future success.



What is a succession planning template?

Essentially, a succession planning template is a structured framework or system designed to help organizations prepare for key personnel changes within the company, including leadership roles.

You can use a succession planning template as a roadmap to outline the next steps and strategies you need to identify, nurture, and promote internal talent to fill those critical positions in your organization.

Any template typically includes sections for evaluating current talent, identifying potential successors, creating development plans, establishing timelines, and addressing contingency scenarios.

Providing a clear and organized framework ultimately streamlines the process, ensuring that your organization can:

- Proactively respond to leadership changes
- Pre-empt risks associated with talent gaps
- Maintain business continuity and strategic direction

In short, it's a tool that empowers businesses to secure their futures by nurturing their talent today.





Why use a succession planning template?

During succession planning, it's vital that you take care of the basics. This will mean having a firm grasp of your **succession planning metrics**—from bench strength to **retention**.

Having a succession planning template makes it so much easier to keep an eye on these. And there are many other benefits to using a succession planning template in your HR day-to-day:

- **It brings structure and organization** to what can otherwise be a complex and daunting process. A clear, step-by-step framework guides HR professionals and leadership teams through each stage of succession planning, ensuring that no critical elements are overlooked.
- **It promotes consistency and transparency** within an organization. By following a standardized approach, all stakeholders have a common understanding of the process, criteria, and expectations, reducing the risk of bias and favoritism.
- **It saves time and resources**. A template eliminates the need to “reinvent the wheel” for each succession planning cycle, making the process more efficient and cost effective. With a template, organizations can quickly adapt and update their succession plans to align with changing business priorities and talent development needs.
- **It helps organizations future-proof themselves** by identifying and grooming their internal talent pool. It ensures that even during unexpected leadership changes, there are qualified individuals ready to step into key roles, maintaining business continuity and stability.





How to create a succession planning template

Succession planning templates will obviously differ based on what your organization needs them for.

For instance, a skills gap analysis template will be completely different from a basic succession planning template, as they're used for different purposes—but each template will have the same basic components.

Here's what you would typically need to do when creating a succession planning template for your organization:

- **Identify key positions.** Begin by identifying the key roles within your organization that require succession planning. These are typically leadership roles and other critical positions.
- **Gather information.** Collect data on the current incumbents of these positions, such as their skills, strengths, weaknesses, and expected retirement dates or potential departure scenarios.
- **Determine successor criteria.** Define the criteria for potential successors—you can always base this on the data you gathered from the incumbents to simplify things. Consider factors like skills, experience, leadership qualities, and alignment with organizational values.
- **Draw up development plans.** Outline the specific **development plans** for each potential successor. This may include training programs, mentorship opportunities, cross-functional experiences, and milestones to track progress.
- **Create a timeline.** Establish a timeline for the succession planning process, including key milestones, reviews, and deadlines for various stages.
- **Establish a communication strategy.** Plan how you will communicate the succession plan to relevant stakeholders, including team members, leaders, and potential successors. Transparency is crucial.
- **Monitor and review.** Set up a system to monitor and evaluate the effectiveness of the succession plan. Define key performance indicators (KPIs) and regular review cycles.
- **Carry out contingency planning.** Develop contingency plans for unexpected leadership changes, such as sudden departures or emergencies.
- **Assess legal and ethical considerations.** Ensure that your plan complies with all legal and ethical standards, including diversity, equity, and inclusion (**DE&I**) considerations.
- **Document the plan.** Create your template to encompass all these elements, providing a structured framework for the entire succession planning process.

Remember, an effective succession planning template is a dynamic tool that should evolve with your organization's needs and the changing talent landscape.

Make sure to regularly check and update it to keep you one step ahead of emerging challenges, and ready to embrace new opportunities.



Succession planning templates

Now you have the basic components of a succession planning template. You know *why* having a succession planning template is a good idea for your HR processes. But what about seeing *how* a succession planning template works in action?

We've included five templates below—all used for different purposes—that can prove useful to your organization, no matter which industry you're in.

Basic succession planning template

This **workforce planning template** is the simplest example of a succession planning template. It can be adapted into whatever your company needs most.

For instance, you may want an overall **executive succession planning template**, covering the most executive positions in your business. Or you may want to tailor it for just one position—for example, for a **CEO succession planning template**.

Either way, this is just a sample succession plan, so you can tweak it however you need to.

KEY POSITIONS	CURRENT LEADERS	POTENTIAL SUCCESSOR(S)	DEVELOPMENT PLAN	TIMELINE
CEO	John Smith	Jane Doe	Leadership training	6-12 months
CFO	Sarah Johnson	Mike Brown	Financial courses	8-10 months
CTO	David Lee	Emily Adams	Technical workshops	12-18 months
Sales Director	Mark Turner	Lisa Parker	Sales coaching	6-9 months
HR Manager	Karen White	James Wilson	HR certification	10-12 months





Emergency succession planning template

As anyone in HR already knows, life happens. This emergency succession planning template helps your organization achieve seamless personnel transitions, especially in the event of an unforeseen leadership change.

Use this template as your foundation to create a strategic blueprint for managing temporary or unanticipated absences of key personnel, such as executive directors or CEOs.

First, identify the main duties that must be carried out, explore contingency measures for interim or alternative hires, and establish clear protocols for the seamless execution of your emergency succession plan.

Again, this is a basic template, so you can customize it to suit your organization's specific needs.





Role specifics		Action items
1	POSITION DETAILS	Identify the role for which the emergency succession plan is being created.
	Position name	
	Incumbent's name	
	Immediate supervisor	
2	KEY RESPONSIBILITIES	List the critical responsibilities and functions of the position that must be carried out.
	Responsibility 1	
	Responsibility 2	
	Responsibility 3	
3	POTENTIAL SUCCESSOR(S)	Identify individuals who can temporarily assume the role during an emergency.
	Potential successor 1	
	Potential successor 2	
	Potential successor 3	
4	INTERIM HIRING OPTIONS	Explore options for hiring interim personnel (if needed).
	Internal promotion	
	External hire	
	Temporary contractor	
5	IMPLEMENTATION PROCEDURES	Establish clear steps and protocols for activating the emergency succession plan.
	Notification process	
	Training and onboarding	
	Communication plan	
	Monitoring and review	



Skills gap analysis template

To find out who would be best to take on an open role, it's important to be able to look at your team members' skills objectively.

A skills gap analysis template, within the context of succession planning, helps you assess both the current competencies *and* future skill requirements needed to seamlessly transition into key roles within your organization.

Spotting those gaps between an individual's existing skills and the skills they need to succeed in a higher-level position means you can pinpoint what targeted training, development, and mentorship programs they might need to bridge those gaps.

This template helps you to proactively cultivate a pipeline of qualified talent for smooth transitions into leadership and critical roles.

Here's how you can use a skills gap analysis for prospective candidates during your succession planning, using the example plan below:

- **Skill category.** List the specific skill categories relevant to the target role or position. We've included some examples for you, but you can change these as you see fit.
- **Current proficiency.** Assess the individual's current proficiency in each skill category on a scale (e.g., 1-5, novice to expert, etc.).
- **Desired proficiency.** Define the proficiency level required for success in the target role.
- **Gap.** Calculate the difference between the current and desired proficiency levels.
- **Training/development plan.** Outline the specific actions, programs, or initiatives recommended to bridge the identified skills gaps.

SKILL CATEGORY	CURRENT PROFICIENCY	DESIRED PROFICIENCY	GAP	TRAINING/ DEVELOPMENT PLAN
Leadership				
Communication				
Problem-solving				
Project management				
Technical skills				
Other (specify)				



Employee development plan template

Now that you've spotted the skills gaps within the team, it's time to properly develop a plan to make sure your people are always achieving their full potential.

Employee development plans play a crucial role in cultivating a thriving and high-performing team. These personalized plans empower your people to concentrate on their objectives, unlock their full capabilities, and amplify their value to the organization.

An employee development plan, in the context of executive succession planning, is the key to identifying and nurturing high-performing individuals within your organization who show the potential to step into critical leadership roles in the future.

It encompasses a tailored set of training, mentoring, and experience opportunities aimed at preparing these individuals to assume executive positions, when the need arises. This means you're more likely to achieve a seamless leadership transition, sustaining your organization's long-term success.

Role specifics		Action items
1	GENERAL INFORMATION	Provide basic information about the individual.
	Name	
	Position	
	Department	
2	DEVELOPMENT GOALS	Set specific, measurable, achievable, relevant, and time-bound (SMART) goals for your team member.
	Short-term goal 1	
	Short-term goal 2	
	Long-term goal	
3	DEVELOPMENT ACTIVITIES	List the activities and resources to help your team member achieve their goals.
	Training programs	
	Workshops/seminars	
	Coaching/mentoring	
	Job rotations/projects	
	Self-study	

4	TIMELINE	Specify the time frame for each development activity.
	Start date	
	End date	
5	SUCCESS MEASURES	Define how success will be measured for each goal.
	Key performance indicators	
	Milestones	
6	RESOURCES NEEDED	Identify the resources required for successful development.
	Budget allocation	
	Materials/tools	
	Mentor/coach	
7	PROGRESS TRACKING	Establish a monitoring and feedback mechanism.
	Check-in frequency	
	Progress review dates	
8	COMMENTS/NOTES	Include any additional comments or notes related to the plan.





Succession planning template for strong candidate identification

One popular model for strong candidate identification is the **9-box model**, also known as the 9-box grid.

The 9-box model is used to compare work performance and potential.

You can use the 9-box succession planning template below as a talent management tool to help you effectively identify leaders and strategically prepare people for future roles. It's also a really helpful succession planning template for managers, especially ones in charge of hiring up-and-coming talent—whether internally or externally.

Using the information you've gathered from the other succession planning templates like the **skills gap analysis** template and the **employee development plan** template, you can use this chart to place the right person in the right position at the right time.

POTENTIAL AXIS	LOW PERFORMER HIGH POTENTIAL	MODERATE PERFORMER HIGH POTENTIAL	HIGH PERFORMER HIGH POTENTIAL
	LOW PERFORMER MODERATE POTENTIAL	MODERATE PERFORMER MODERATE POTENTIAL	HIGH PERFORMER MODERATE POTENTIAL
	LOW PERFORMER LOW POTENTIAL	MODERATE PERFORMER LOW POTENTIAL	HIGH PERFORMER LOW POTENTIAL
PERFORMANCE AXIS			

From this chart, anyone who you can see in the “high performer, high potential” category is an ideal candidate to take on the role.

You can also include anyone within the “moderate performer, high potential” and “high performer, moderate potential” categories in your shortlist, as these people could also be promising candidates.



Succession planning best practices

Succession planning is not merely a box to tick on an HR checklist—it's a strategic initiative that lays the foundation for an organization's enduring success. Here are some best practices when starting your succession planning:

- **Identify critical roles and competencies.** Look beyond the current occupant and consider the evolving demands of the position.
- **Foster a culture of continuous learning and development.** Encourage your people to acquire new skills and knowledge, creating a pool of potential successors who are well prepared to step up when the time comes.
- **Keep open lines of communication.** Engage in candid conversations with your people about their career aspirations and potential growth within the organization. This not only demonstrates your commitment to their professional advancement but also helps you identify high-potential individuals.
- **Monitor and review your succession plan regularly.** The business landscape is always evolving and so are the skills required for success. Regular updates and adjustments will ensure that your plan remains agile, aligning with the company's strategic goals and responding to emerging talent trends.



How you can put the “success” in succession

Want to save the effort of creating your own templates from scratch? Easy. You can download ours.

(Or, if you want to be super efficient, you can look to some nifty **workforce planning software** to do it for you.)

Remember, a successful succession plan is not just about filling positions, but about building a resilient and adaptive workforce that can weather any storm.

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An HR platform such as Bob offers a one-stop-shop for all things people. It sits at the center of your HR ecosystem, is fully customizable, and grows with your organization.

In a short time, Bob can be deployed to enable communication, collaboration, and connectivity that drives stronger engagement, productivity, and business outcomes.



For HR

It delivers automation of many common processes, allows greater oversight and visibility of the business, and centralizes all people data in a secure, user-friendly environment.



For managers

It provides access to data and insights to help them lead more effectively and streamline processes.



For employees

It's the tools and information they need to connect, develop, and grow throughout their journey.