

SUCCESSION ASSESSMENT: PART 1

SUCCESSION PLANNING TASK	STATUS	RATE (1-10)
	Rate 1 = Poor, Rate 10 = Excellent	
Create White Space to Clarify Your Personal Why		
Recruit Your Planning Advisors		
Clarify Vision		
Determine Your Financial Needs		
Assess the Health of Your Operations		
Assess the Health of Your Systems		
Assess the Health of Your Tools		
Review and Evaluate Current Organizational Chart		
Identify Urgent and Future Roles for Succession		
Assess Current Talent Bench		
Personnel Gaps		
Access Talent Sources		
Teammate Performance Ratings		
Team Readiness Rating		
Agent Acquisition Assessment		
Agent Recruiting Systems		
Recruiting Workflow		
Documented Onboarding		
Coach Program		
Training Program		
Improve Agent/Employee Engagement		

SUCCESSION PLANNING TASK

STATUS

RATE (1-10)

Rate 1 = Poor, Rate 10 = Excellent

Improve Agent/Employee Accountability

Retention Assessment

Set Performance Metrics

Distribution of Sales by Agent

Lead Source Percentages

Additional Lead Source Appraisal

Repeat & Referral Client Base Appraisal

Paid Lead Appraisal

Marketing Blueprint

Marketing ROI

Goodwill in Community

Active Vendor List

Customer Satisfaction

Established Budget

3 Years of P and L

Tool Creation Needs

Document Creation Needs

System Improvement Needs

Determine Timeline

Communicate Succession
Information to Team

Meet Monthly with Team to
Monitor Progress & Update Plan