

SUCCESSION TEAM REPORT CARD

HAS YOUR SUCCESSION TEAM COMPLETED:	YES	NO
Embracing the purpose for succession planning is clearly defined. The purpose includes the team mission, team needs including systems and talent.	<input type="checkbox"/>	<input type="checkbox"/>
Clearly define smart goals to support objectives.	<input type="checkbox"/>	<input type="checkbox"/>
Strategize on preferred timeline.	<input type="checkbox"/>	<input type="checkbox"/>
Determine the role and responsibilities the owner will take during the transition process and post transition. Clarify with steps.	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate current talent to identify leaders, identify their preferred future and identify missing talent.	<input type="checkbox"/>	<input type="checkbox"/>
Operations systems Review	<input type="checkbox"/>	<input type="checkbox"/>
Swim Lane Review	<input type="checkbox"/>	<input type="checkbox"/>
Yearly planning analysis	<input type="checkbox"/>	<input type="checkbox"/>
SWOT analysis completed	<input type="checkbox"/>	<input type="checkbox"/>
After reviews, determine missing systems, processes, tools.	<input type="checkbox"/>	<input type="checkbox"/>
Have definitive steps been scheduled to address strengthening the Operations manual, refine swim lanes, and match against the yearly goals. This measure, targeting initiatives, aimed at bolstering weaknesses and protecting against threats.	<input type="checkbox"/>	<input type="checkbox"/>
Established a regular review schedule to examine results of the succession planning and management program.	<input type="checkbox"/>	<input type="checkbox"/>

SCORING	YES	NO
Add up the “Yes” and “No” boxes and then insert the sums where indicated at the right. Obviously, the more “Yes” boxes your organization has, the closer your organization is in line to best practice in succession planning and management.	<input type="checkbox"/>	<input type="checkbox"/>

If your Yes score is 12-10: Congratulations! Your effort is commendable and aligns well to best practice.

If your Yes score is 9-6: The organization needs to devote more time and attention to the succession program to bring it into alignment with best practice.

If your Yes score is 5 or below: Stop. Look. Listen: Focus attention on improving the succession program immediately!