SUCCESSION TEAM ACCOUNTABILITY TRACKER

Use the following questions as a roadmap for ongoing discussions with your succession planning team. Delving into these details and creating accountability around these results will not only foster productivity but will also optimize the value of your collaborative sessions.

To date, what are the top three items that you have made the most significant progress towards with your succession plan? How can you continue to support that success?

1. ______________________________

____

2. ______________________________

____

3. ______________________________

____

Which items in your succession plan are proving to be the most difficult? List all below:

1. ______________________________

2. ______________________________

3. ______________________________

What gaps exist that at this point are most urgent?

1. ______________________________

2. ______________________________

3. ______________________________

What revisions to the plan are necessary?

1. ______________________________

2. ______________________________

3. ______________________________

Have you identified your missing person and detailed the need and job description on a written report? Y/N If not, list below the expectation for completion:

What actions will be taken today to find your missing persons?

1. ______________________

2. ______________________

3. ______________________

What are the next steps?	**Who is responsible for them?**	**What is the deadline?**
1. ____________	____________	____________
2. ____________	____________	____________
3. ____________	____________	____________

What are the deadlines for those next steps?

When is the next meeting and what is the expectation for each attendee at that time?

Date:
Person: ____________ **Task:** ______________________

Date:
Person: ____________ **Task:** ______________________

Date:
Person: ____________ **Task:** ______________________

Date:
Person: ____________ **Task:** ______________________

Date:
Person: ____________ **Task:** ______________________

SUCCESSION TURNOVER CHECKLIST

If you do not have a digital document to serve as an instructive manual for systems, tasks and the actions to support those, this checklist will serve as a basis to create one. If you have an existing Operations Manual, this list will help you to begin the process of brainstorming with your team to further define what is working well or to find weaknesses.

As you move forward in your transition planning, this document should go deep into each task, who is responsible for executing and I personally suggest live links embedded within to take the reader to the actual forms, documents, location in your electronic drive, or a video associated etc., so that the viewer has a simple way to get acquainted with the documents and have a complete understanding of how to accomplish the directives.

Goals:

◻ What are the yearly objectives for the team?
◻ What are the yearly current goals?
◻ What is the cadence for reviewing objectives and goals?
◻ Who is responsible for those objectives and goals?

Time Block Analysis:

◻ Look at leadership calendars, determine where time is invested
◻ Complete a 15 min time study analysis
◻ What meetings do you have daily, weekly, monthly, yearly?
◻ What obligations for your attendance or your teams at networking or educational events?

Organization:

◻ What does the current organization chart look like?
◻ What should the future organization chart look like?
◻ What are their roles and responsibilities
◻ Include all job descriptions
◻ HR policies and practices?
◻ How are Performance reviews handled?

People:

◻ Is there a diversification of producing agents?
◻ When are performance appraisals due?
◻ What personnel gaps do you have?
◻ Review your team’s employee and agent contracts with HR
◻ How deep is your talent bench?

References:

◻ What reference materials should be included?
◻ Which training videos should be linked?
◻ Employee handbook

Financials:

◻ Include the budget
◻ Include a link to the monthly and year-to-date P and L
◻ How are employees paid?
◻ What is the process for agent commission transmissions?
◻ Include a 3 year historical of P and L’s
◻ Include contracts with active vendors and details on those relationships