



**MINI GUIDES**

Creating a  
**SUCCESSION  
PLAN**  
[that work]

# SUCCESSION PLANNING

## an introduction

### What is **SUCCESSION PLANNING?**

*Succession planning* is the process of identifying the critical positions in your organisation, and developing action plans to retain and develop your people so that they are ready to take their next step.

### Why is it **IMPORTANT?**

The goal of a succession plan is to identify critical positions in your company, and define the key competencies and skills necessary to perform them.

At the same time, a good succession plan is also focused on the development of your people to meet future business needs.

Succession planning is a critical element of People Strategy, supporting anything from organisational and business strategy to Talent Management and Development.

# SUCCESSION PLANNING

## the flow

### ASSESS

1

**Company strategy** definition and alignment

2

Identification of **critical positions**

3

Identification of key **competencies and skills**

### EVALUATE

4

Define performance and talent **metrics**

5

Deploy clear and transparent **evaluation systems**

### DEVELOP

6

Capture and retain **critical knowledge**

7

Design and deploy **development initiatives**

# SUCCESSION PLANNING

## Step 1: ASSESS

Everything starts with achieving alignment on business goals and strategy.

What positions will be critical to achieve them? What competencies, skills and knowledge will be critical success factors?

1

Define your **company strategy**. Align on your business goals and how you intend to achieve them.

2

What are the **critical positions** needed to achieve the goals you identified?

3

Identify the **competencies, skills and knowledge** that the people will need to be successful in those positions

### THINGS THAT HELP

Strategy alignment meetings

Definition of **vision** and **mission**

**Goals** setting and alignment

Organisational maturity assessment

Competency mapping

Position profiling

# SUCCESSION PLANNING

## Step 2: EVALUATE

After achieving alignment on your business goals, organisational priorities and having identified the critical positions needed to achieve them, it is time to get practical.

**Create systems to identify high potential individuals.**

What will they need to be successful in the critical positions you identified?

4

Identify and streamline job profiles based on **objective and measurable metrics** that are connected to the business goals and strategy

5

Design and deploy clear, transparent **performance and potential evaluation** systems

### THINGS THAT HELP

Job profiles creation

Performance management metrics

Feedback system design & setup

# SUCCESSION PLANNING

## Step 3: DEVELOP

So far, you have worked on defining your company's strategy and goals, and created ways to identify key skills and abilities needed to achieve them.

You have also set up ways to identify people with the highest potential to fit into the critical positions you identified.

Now, it is time to help them fit in those positions.

6

Create ways to **capture and retain critical knowledge** in your organisation and across roles and functions

7

Design **relevant and targeted development initiatives** that prepare your people to meet business goals and future challenges

### THINGS THAT HELP

Mentoring systems

Management skills development

Leadership skills development

Coaching systems development

Information & knowledge sharing systems



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We hope it was helpful.

If you would like to explore how can SB&A help you and your organisation, do not hesitate to contact us!



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