

Succession Planning Templates Examples

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 and 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	

Succession Planning Template					
Position	Current Position Holder	Succession Planning Timeline	Vital Competencies	Succession Candidates	Readiness Rating
The role or job title that the succession plan applies to.	The individual currently holding the position that the succession plan applies to	The schedule or timeframe for identifying, evaluating, and preparing candidates for the role.	The key skills and qualifications that are required for the role.	The individuals who are identified as potential candidates for the role.	A rating system to evaluate the candidate's readiness the role. It can be based on factors such as qualifications, experience skills, and performance in current role and development plan.
CEO	Jasmine Smith	12 months	Strategic thinking, decision making, leadership, communication, financial acumen	John Smith	9
				Jane Doe	7.5
CFO	George Floyd	5 months	Financial analysis, budgeting, forecasting, accounting, leadership	Mike Johnson	8.5
				Sarah Lee	9.5
IT Director	Julien Nguyễn	24 months	IT management, technical skills, project management, problem solving, leadership	David Chen	6
				Lisa Lee	6.5