



Featured Workshop: From Plan to Pipeline – Putting Succession Planning into Practice

ATTENDEE WORKBOOK

SEPTEMBER 16TH 2026



What is Succession Planning?

DEFINITION

Succession planning is a process to create and manage the organization's talent pipeline. Succession planning often includes:

- **Identifying the key positions** in an organization and the competencies they require.
- **Cultivating a pipeline** of high-potential talent from which to select new leadership.
- Understanding the **competencies and skills currently available** within the organization.

Source: Society for Industrial and Organizational Psychology (2024)

THE KEY COMPONENTS OF EFFECTIVE SUCCESSION PLANNING



Identifying Talent

Write down a list of 5 people you lead/work with that could one day be a candidate for your role.

1.

2.

3.

4.

5.

Performance Criteria

See below for example performance criteria.

Low Performance inconsistently meets some aspects of the role as currently defined, or the employee is still building capability in one or more important areas.	Medium Performance consistently meets the full scope of role expectations at the level the job was designed for.	High Performance consistently surpasses the defined scope of the role and measurably elevates results, people, or systems beyond what is expected.
<ul style="list-style-type: none"> • Inconsistently delivers across all responsibilities • Strong in some areas but uneven in others • Requires more coaching or follow-up than peers • Still developing proficiency in key competencies • May struggle with increased complexity or independence 	<ul style="list-style-type: none"> • Consistently delivers quality work on time • Demonstrates sound judgment aligned with agency standards • Manages responsibilities independently • Maintains positive working relationships • Handles normal complexity and pressure effectively • Rarely requires corrective intervention 	<ul style="list-style-type: none"> • Consistently delivers outcomes above target, not just on target • Improves systems rather than just operating them • Anticipates issues before they emerge • Elevates the performance of others • Takes on stretch responsibilities successfully • Handles significantly greater complexity than the role requires • Demonstrates performance at the next level consistently
Keep in mind...		
<p><i>This does not automatically mean poor performance or PIP-level issues. It means there is a meaningful gap between current performance and full role expectations. May include: employees newer to role scope, individuals stretched beyond current capabilities, or solid contributors with one or two meaningful performance gaps.</i></p>	<p><i>This implies competent, reliable, and trusted. It does not imply average, mediocre, or coasting. If everyone on your team consistently met expectations, you would have a high-performing department.</i></p>	<p><i>If someone exceeds expectations only during a crisis, short-term projects, or high-visibility assignments, but performs at role level the rest of the time, then "Medium" is probably a more accurate designation.</i></p>

Potential Criteria

See below for example potential criteria.

Low Rarely demonstrates the behaviors associated with success at a broader or more complex level and may need additional time, experience, or development before taking on expanded responsibilities.	Medium Periodically demonstrates readiness to grow into broader responsibilities with continued development and experience.	High Consistently demonstrates the behaviors associated with success at the next level and is well-positioned to take on broader or more complex responsibilities in the future.
<ul style="list-style-type: none"> • Prefers familiar routines and is slow to adapt to change. • Hesitates to make decisions without significant guidance. • Focuses primarily on immediate tasks rather than broader organizational impact. • Has difficulty building influence or collaborating beyond their immediate team. • Requires ongoing coaching to strengthen adaptability, judgment, and interpersonal effectiveness. 	<ul style="list-style-type: none"> • Adapts effectively to changing priorities and learns new skills as expected. • Makes sound decisions aligned with organizational values and role expectations. • Demonstrates ownership, accountability, and good judgment. • Builds positive relationships and collaborates effectively across teams. • Seeks feedback and continuously improves performance and effectiveness. 	<ul style="list-style-type: none"> • Quickly adapts to change and helps others navigate uncertainty. • Makes strategic decisions that consider long-term organizational impact. • Influences and develops others without relying on formal authority. • Builds strong, trust-based relationships across the organization. • Anticipates future challenges and drives continuous improvement and innovation.
Keep in mind...		
<ul style="list-style-type: none"> • <i>We are assuming if you are "high" potential you are also demonstrating most if not all of the behaviors under "medium" potential</i> • <i>An individual should be demonstrating at least four out of the five behaviors in a category to be given that rating.</i> 		

Mapping Talent

Use the space below to fill in the 9-box based on your list of individuals on the previous page, and the performance and potential criteria provided. You can use the numbers of each person rather than writing out their full name.

Potential	High			
	Medium			
	Low			
		Low	Medium	High
		Performance		

Legend	High Potential	High Performer	Effective/Static	Developing/ Concern
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Defining “80% Ready” Successor

An 80% successor can:

- Deliver on the mission-critical outcomes of the role
- Make sound decisions aligned with policy and values
- Maintain trust with key internal and external stakeholders
- Manage the team and day-to-day workflow effectively
- Escalate appropriately when needed
- Keep services running without disruption

But here’s the key boundary:

The missing 20% cannot include responsibilities that would create legal exposure, public safety risk, major financial mismanagement, or reputational damage if mishandled.

80% Readiness Test (Yes/No Checklist)

- ☐ Could this person step in tomorrow and keep operations stable?
- ☐ Would stakeholders remain confident?
- ☐ Are the successor’s gaps developmental in nature?
- ☐ Are any of the gaps a catastrophic risk or liability to the organization?

Example Labels of Readiness:	Definition:
Ready Now	Candidate has 80%+ of required competencies.
Ready in 1-2 Years	Candidate has 60-79% of required competencies; development includes targeted training and moderate experience acquisition.
On the Radar	Candidate has 50%+ of required competencies; monitor ongoing development and discuss long-term motivations.

Individual Role Activity

Think about your role and which people in your organization could potential fill your shoes.

Potential Successor	Is this successor: <ul style="list-style-type: none">• ready now?• ready in 1-2 years?• on the radar?

Use the space below to fill in possible development activities for one of the successors you identified.

3	2	1
Development Gaps	Developmental Activities	Key Relationship
What are 3 key areas they need to develop in to be better prepared for the role?	What are 2 stretch assignments or trainings they would benefit from?	Who is 1 person, within or outside of the organization, they should build or repair a relationship with?

Identifying Critical Roles

Identify Critical Roles

Critical roles extend far **beyond the CEO or owner**. Consider roles with significant decision-making authority, specialized expertise, key customer or stakeholder relationships, or responsibilities that would be difficult to replace. **If left vacant, these positions would create a meaningful disruption to operations,** leadership, or strategic objectives.



As a baseline, **critical roles typically make up about 10% of your total workforce** (e.g. 500 employees; 50 critical roles).

In the space below, identify 5 critical roles within your organization.

1.

2.

3.

4.

5.

Mapping Bench Strength

Write in the critical roles you've identified, document potential successors, and indicate how ready they may be to take on that role.

RN = Successor ready now

1-2 = Successor ready 1-2 years

OTR = Successor on the radar

Critical Role	
Potential Successor	RN
Potential Successor	1-2
Potential Successor	OTR

Assessing Bench Strength

Take a few minutes to evaluate the bench strength of the critical roles you've identified from this exercise.

How many successors are "ready now"?	
How many successors will be ready in "1-2 years"?	
How many successors are "on the radar"?	
How many critical roles don't have any "ready now" successors?	
What is your key takeaway from this exercise?	

Continuing the Conversation

Below are some questions you may consider bringing back to your organization about their current succession planning and talent review processes.

Succession Planning Process:

- How strong is our bench strength of leaders?
- What should the process be for cascading this process down?
- How many levels down should we go?
- Who should be involved in the process?
- Does the potential criteria need to change or should it remain the same?
- Who owns the process?

Succession Planning Communication:

- What will be communicated to successors?
- What will be communicated to the broader workforce if anything?
- When will these communications happen?

Development Planning:

- When should a development plan template be created?
- Where does it live? Who has access?
- When should development planning occur?
- How do we hold ourselves accountable to follow-through?

High-Potential Employees:

- What do we do with high potentials who are not successors?
- Do we communicate to them that they are high-potential?
- How do we invest in them and retain them?



OUR TALENT MANAGEMENT SOLUTIONS



1. COMPETENCY MODELING

A foundational framework that aligns skills and behaviors to organizational success by:

- Defining a set of competencies needed for current and future success.
- Setting clear expectations for current and future roles.
- Strengthening capabilities and skillsets of the workforce.
- Bolstering performance management, talent review, and succession planning efforts.



2. PERF. MANAGEMENT

A key talent management process to ensure employees contribute to organizational objectives by:

- Setting cascading goals.
- Providing regular, competency-based feedback and evaluations.
- Using data to identify role-specific needs and growth opportunities.
- Recognizing top performers and addressing underperformance.



3. TALENT REVIEW

This strategic process helps the organization understand the current talent landscape by:

- Defining the specific skills and traits that describe a "hi-potential."
- Categorizing talent based on a combination of both performance and potential.
- Mitigating talent retention risks.
- Serving as a precursor to effective succession planning discussions.



4. SUCCESSION PLANNING

A key part of a talent management strategy that ensures future success by:

- Identifying critical roles and key personnel needed to maintain business operations.
- Mapping talent to these roles and identifying potential successors.
- Evaluating readiness of successors for key positions.
- Supporting the development and transition of successors.

THANK YOU!



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