



SUCCESSION PLANNING

CHECKLIST

A Quick Audit + 5 Strategic Next Steps



LEADERSHIP
& TALENT
CONSULTING

3
DECADES

QUICK AUDIT: ARE YOU SUCCESSION-READY?



Use this checklist to quickly assess whether your organisation is set up for successful leadership succession.

☐

We have a documented succession plan for all key leadership roles.

☐

The board and executive team regularly review our succession strategy.

☐

We proactively identify and assess potential internal successors.

☐

We use clear criteria (skills, leadership traits, values) when selecting future leaders.

☐

We include succession planning in performance reviews and leadership development.

☐

We conduct talent mapping across critical departments.

☐

We have a communication plan around succession planning and transitions.

5 STRATEGIC NEXT STEPS TO IMPROVE YOUR PLAN



01

IDENTIFY

Pinpoint which roles are critical to your business continuity and future growth.

02

ASSESS

Pinpoint which roles are critical to your business continuity and future growth.

03

DEVELOP

Pinpoint which roles are critical to your business continuity and future growth.

04

IMONITOR

Pinpoint which roles are critical to your business continuity and future growth.

05

COMMUNICATE

Pinpoint which roles are critical to your business continuity and future growth.