

# Management Succession Plan Workbook

## 1. Organization Information

Organization Name	
Date	
Prepared by	

## 2. Succession Planning Objectives

State the purpose and objectives of your succession plan.

## 3. Key Positions & Incumbents

Position Title	Current Incumbent	Planned Successor(s)	Key Competencies Required	Estimated Transition Date

## 4. Readiness Assessment

Potential Successor	Strengths	Development Needs	Readiness Timeline

## 5. Development Action Plans

Describe strategies, activities and resources to develop potential successors.

## 6. Succession Plan Review Schedule

Review Date	Reviewers	Notes/Comments

## 7. Additional Notes

Add any further comments or information relevant to this plan.