

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.