

# The Advisory Alliance

## Checklist for Succession Planning

- Succession Planning is owned and led by the Board of Directors and the CEO<sup>1</sup>.
- Succession Planning is part of our company's<sup>2</sup> strategy?
- The Board of Directors and the CEO are committed to a succession planning process over time, and not just an afternoon event.
- The Board of Directors and the CEO have expertise in succession planning.
- HR has expertise in succession planning.
- Talent development is not just discussed; it's practiced in our company.
- In succession planning, we focus on key roles and key people.
- We have defined the needed knowledge, skills, and personal attributes for each key role.
- We know how vulnerable we are for not being able to fill key roles.
- We know who could fill each key role and how soon.
- We assess the performance and the potential of our people.
- Our company's culture welcomes candid conversations about individuals' performance and potential.
- We discuss and debate their performance and potential, on a regular basis; it's part of what we do as leaders.
- We are able to differentiate among individuals based on their performance.
- We develop the potential of our key people, rigorously.
- We have development plans for our key people.
- Their development plans are updated regularly.
- We track our people's progress in their development.
- We hold our leaders accountable for talent development and succession planning.
- We don't reward or promote leaders who don't develop their people.

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<sup>1</sup> By "CEO", we include Executive Directors, Directors, Presidents, and all other heads of organizations.

<sup>2</sup> By "company", we refer to both for-profit and non-profit organizations.