

# Succession Planning – Summary Guide

## Overview

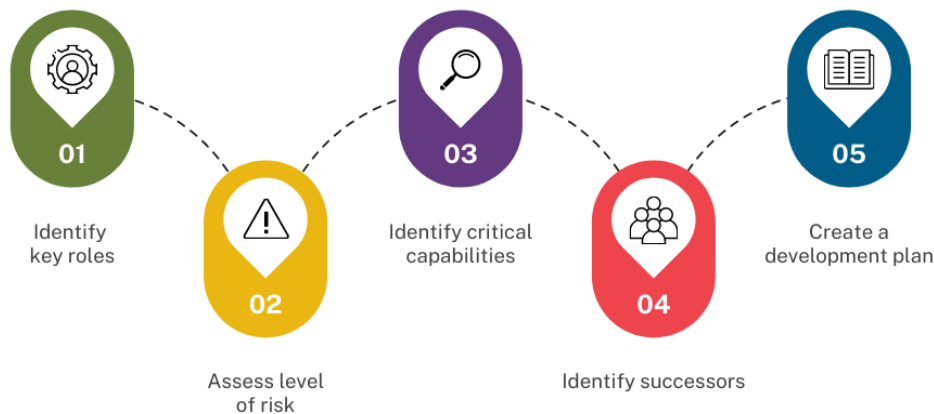
Succession planning is a process and strategy for identifying key roles within your team and developing a plan for who could assume that role if/when it becomes available. The plan lays out the time and activities the team member would need to learn all the skills and knowledge they will need to take over that key role.

In the past succession planning was often only used to identify and develop new, potential leaders who can move into high-level leadership roles, but it can, and should, be used at all levels of council.

In every branch within council there are key team members and key roles which are vital to our success, and we might be left in a difficult position if any of these roles suddenly become empty. You might have a team member with specific skills in a piece of software, or one key team member who coordinates a range of external services. What happens to the business if one of these team members suddenly leaves?

Succession planning is how we prepare for this situation. The process doesn't need to be complicated, follow the steps below to prepare your team.

### 5 Steps of Succession Planning



#### Step 1: Identify key roles

The first step is to identify critical positions within your team. These are the roles that hold specific knowledge and skills or are critical to the successful operation of the team.

#### Step 2: Assess the level of risk.

Now that you've identified the key roles in your team, you'll need to assess the risk to council if any of these roles are suddenly empty. Succession planning focuses on the highest risk roles first.

#### Step 3: Identify critical capabilities

For each of those high-risk key roles, work out the skills and knowledge that are required to do the job successfully. Consider, if you were hiring someone to do that job, what skills would they need?

#### Step 4: Identify successors

Now that you've identified the role that will need filling, it's time to work out who might be a good fit for the role. Ideally, you want more than one candidate for the role. These might come from within your team, or perhaps within another team.

#### Step 5: Create a development plan

Now that you've identified possible team members as part of your succession plan, you'll need a plan to help them gain the skills and knowledge to successfully take over the role if/when the time comes.