



# Succession Planning Checklist

How ready are you? Add up  
the number of yeses to  
determine your risk

**Measure your succession risk on the below succession planning checklist**

## MY ORGANISATION...

1. **Has Identified Its Business-Critical Roles**
2. **Has A Pre-Emptive Plan To Fill Important Roles**
3. **Plans For The Sudden Loss Of Key Employees**
4. **Knows Exactly Who Is Ready To Step Into Which Role**
5. **Ensures The Best People Are Shortlisted**
6. **Has A Clear View On Employee Performance**
7. **Bases Talent Decisions On Objective Insights**
8. **Balances Objective Data With Management Feedback**
9. **Integrates Employees' Perspectives**
10. **Keeps Its Talent Pipeline Up To Date**
11. **Creates Career Paths Together With Employees**
12. **Uses Succession Insights For Employee Development**
13. **Measures The Effectiveness Over Time**
14. **Has Leaders Who Champion Succession Planning**
15. **Sees A Positive Impact From Succession**

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# Calculate the Risks

Count the number of ticks to  
determine your organisation's  
level of risk

## 0-3: Extremely high succession risk

The organisation is not equipped for sustainable performance and business continuity. Consider which talent management elements to put in place to start building your succession strategy.

## 4-7: High succession risk

The organisation is under-equipped for sustainable performance and business continuity. Determine where to focus first to close the gaps and build a more resilient succession process.

## 8-11: Moderate succession risk

The organisation is equipped for sustainable performance and business continuity. Assess and implement any remaining gaps to further improve your succession process.

## 12-15: Low succession risk

The organisation is well-equipped for sustainable performance and business continuity. Implement any relevant changes to optimise your succession process.

Chat to our team of experts for a free Succession health check and practical advice on how to get started.

**Book a meeting**



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