## **Organizational Succession Planning Template**

| Position               | <b>Production Supervisor</b> | Quality Manager | Sales Manager   | Technology Director | IT Manager      | Finance Director | Product Manager | Supply Chain Supervisor | <b>Business Director</b> |
|------------------------|------------------------------|-----------------|-----------------|---------------------|-----------------|------------------|-----------------|-------------------------|--------------------------|
| Held By:               | Matt Smith                   | Mary Watson     | Tyler Risten    | Suzie Charleston    | Wilson Kang     | Jennifer Jones   | Peter Riley     | Vikram Gupta            | Miles Hilliard           |
| Candidates Ready Today | Eric Wilson                  |                 | Sarah LeCroix   | Henry Isaacson      | Daniel De Grace |                  | Richard Creesly | Stephen Killian         | Sarah LeCroix            |
|                        |                              |                 |                 |                     | Thomas Calhoun  |                  | Eric Wilson     | Eric Wilson             |                          |
|                        |                              |                 |                 |                     |                 |                  |                 |                         |                          |
| Near Term Candidates   | Wendy Gephardt               | Wendy Gephardt  | Richard Creesly | Thomas Calhoun      |                 | Riley Emerson    | Grayson Epwich  |                         | Henry Isaacson           |
| (Ready in 1-3 Years)   |                              | Pepper Waters   |                 |                     |                 |                  | Henry Isaacson  |                         | Richard Creesly          |
|                        |                              | Nicole Ashton   |                 |                     |                 |                  |                 |                         |                          |
|                        |                              |                 |                 |                     |                 |                  |                 |                         |                          |
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|                        |                              |                 |                 |                     |                 |                  |                 |                         |                          |
|                        |                              |                 |                 |                     |                 |                  |                 |                         |                          |
| Future Candidates      | Bob Greenwood                |                 | Nicole Ashton   | Bob Greenwood       | Kristin Clapp   |                  |                 | Wendy Gephardt          |                          |
| (Ready in 5+ Years)    | Kyle Carter                  |                 |                 | Kristin Clapp       |                 |                  |                 | Nicole Ashton           |                          |
|                        | Izzy Lincoln                 |                 |                 |                     |                 |                  |                 |                         |                          |
|                        | ,                            |                 |                 |                     |                 |                  |                 |                         |                          |
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## **Using This Template:**

- 1. List the leadership positions within your organization and the present holder of the role
- 2. Identify the various individuals within your organization that could readily step into the given leadership roles immediately should a vacancy arise
- 3. Next, identify those possible candidates who could step into a given leadership role soon (1-3 years) after some development and mentoring
- 4. Last, identify individuals who would be long-term successors to leadership positions (5+ years) following training and development activities
- 5. Individuals may be listed at multiple locations, based on their career interests and goals
- 6. Refresh this list annually; consult the list as vacancies and changes in your organization occur.

Rev. 1



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