

Succession planning is making sure you've got the right people ready to step into key roles when needed. It's like preparing your team to keep winning, even if a key player steps out.

## Why You Need It:

**Smooth Transitions:** When leaders leave, the business keeps running smoothly. No chaos, just forward momentum.

**Legacy Building:** Want your impact to last? Succession planning lets you pass the torch to the next generation.

**Risk Protection:** Whether you retire or leave unexpectedly, your company shouldn't be left scrambling.

## When Do You Need It?

**Imminent Departure:** If a leader is about to retire or leave, don't wait until it's too late.

**Growth:** Expanding? You'll need strong people ready to step into new roles.

**Crisis:** Life throws curveballs—succession planning keeps things stable.

**Legacy:** If you want your vision to live on, start grooming future leaders now.

**Restructuring:** Mergers, acquisitions, or changes—ensure your team can handle the new setup.

## The 5-Step Succession Planning Process

### Step 1: Identify Key Roles for Succession

First, figure out which positions will need a successor. Think of it as deciding which seats in the boat are mission-critical—you can't race with an empty spot.

### Step 2: Find Potential Internal Candidates

Look at your current roster. Who's got the strength, skills, and determination to move up the ranks? Just like picking the perfect stroke, you need someone who can set the pace.

### Step 3: Communicate the Plan

Share the game plan with the team. Let your potential successors know where they're headed. It's like announcing who's in the lineup for the next race—you want everyone ready to pull hard.

### Step 4: Develop a Growth Plan

Create a tailored development plan for each successor. This is your training program—mentoring, skill-building, job shadowing—it's all about getting them race-ready.

### Step 5: Monitor Progress and Execute

Regularly check in on how your future leaders are developing. It's like reviewing race footage—what's working? What needs adjustment? Keep the pressure on so they're ready when it's time to perform.

# ORG CHART PRESENT

VISUALIZING KEY ROLES

**V:DA**

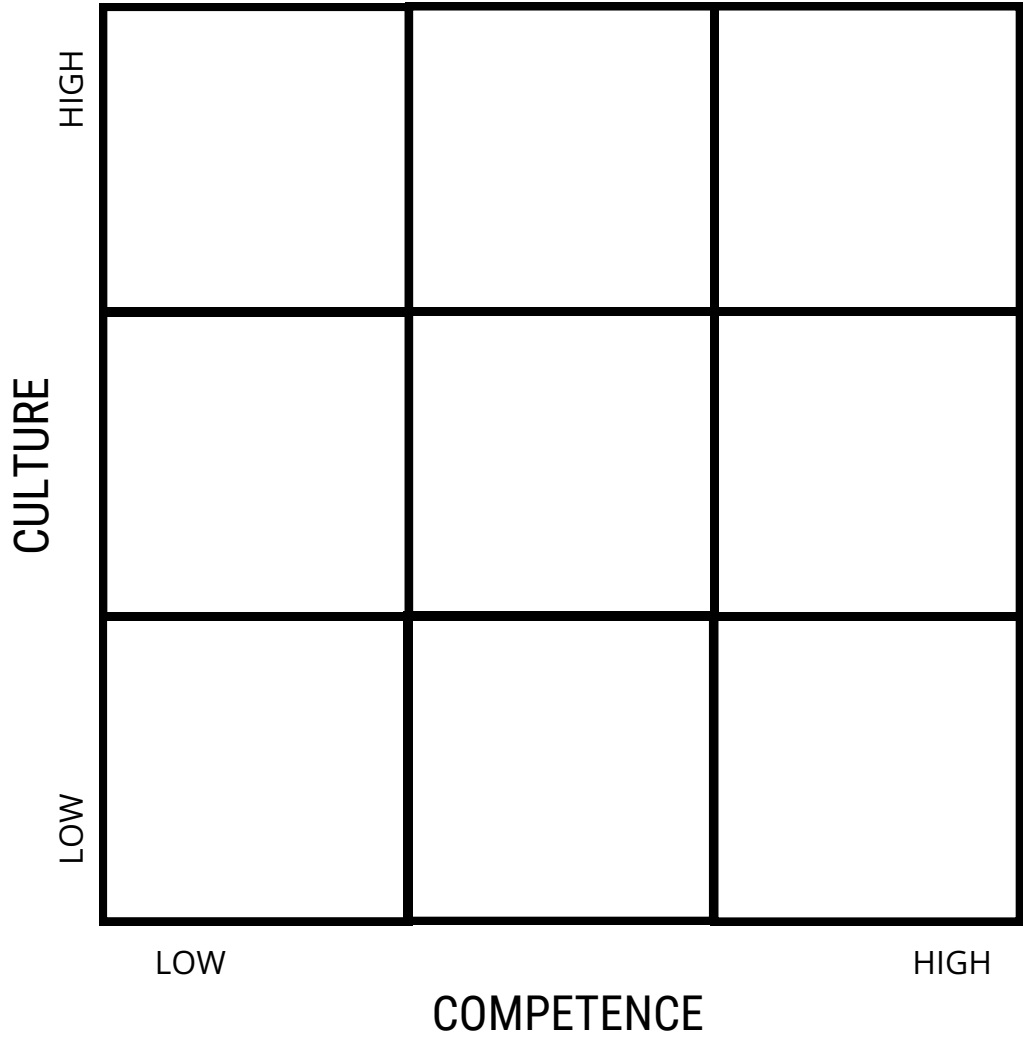
# ORG CHART FUTURE | VIDA

VISUALIZING KEY ROLES

# PEOPLE ANALYZERS | VIDA

VISUALIZING PEOPLE IN ROLES

Critical Role:



Critical Role:

Key People:

Get It

Want It

Capacity  
To Do It

Comments


# 5-STEP SUCCESSION PLAN

SUCCESSION PLANNING ACTION STEPS

**Key Roles Needing Succession:** What roles are most critical for the organization's long-term success, and how will you prioritize them for immediate attention?

**Identifying Internal Successors:** Who in your organization demonstrates the skills and motivation needed for future leadership, and how will you assess their readiness?

**Communicating the Plan:** How will you ensure transparency and gain buy-in from key stakeholders when communicating your succession plan?

**Development Growth Plans:** What specific development strategies will you implement to prepare potential successors for their future roles?

**Monitoring & Accountability:** How will you track progress and ensure accountability for both leadership development and succession goals?