



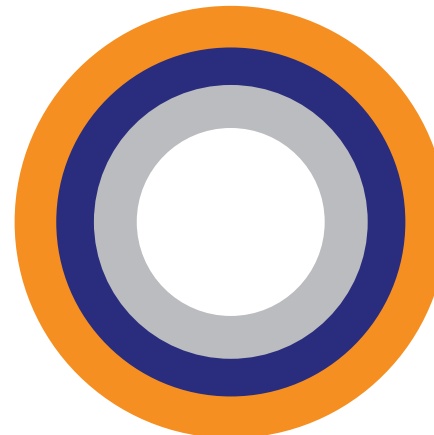
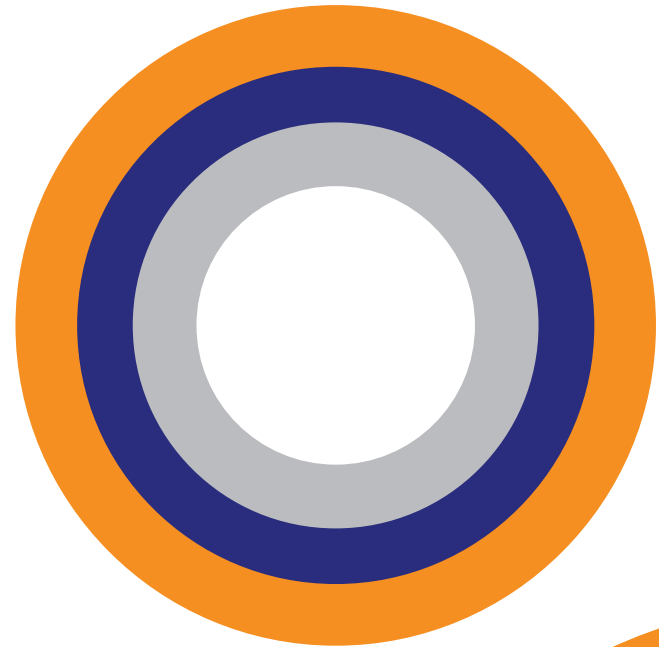
# At-A-Glance Critical Roles Worksheet

## The Goal:

- identify the roles your organization should target in your succession program

## The Steps:

- list your direct reports
- rate each direct report on:
  - readiness to move into your position
  - their plan to remain with the organization
  - the availability of replacements for their role, should the candidate leave or be promoted
- when evaluating someone's plan to remain, consider their eligibility to retire as well as the potential risk that they will seek opportunities elsewhere
- begin with your team, but a good succession plan will scale this exercise out to multiple teams and levels
- print and complete one chart per critical role



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# At-A-Glance Critical Roles Worksheet

Position

Name

Position

Name

Readiness for Position
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Planning to Remain
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Replacement Readiness
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Position

Name

Readiness for Position
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Planning to Remain
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Replacement Readiness
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Position

Name

Readiness for Position
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Planning to Remain
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Replacement Readiness
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Position

Name

Readiness for Position
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Planning to Remain
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Replacement Readiness
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Position

Name

Readiness for Position
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Planning to Remain
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Replacement Readiness
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Position

Name

Readiness for Position
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Planning to Remain
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Replacement Readiness
 ☐ 1-3
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Position

Name

Readiness for Position
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Planning to Remain
 ☐ 1-3
 ☐ 3-5
 ☐ 5+

Replacement Readiness
 ☐ 1-3
 ☐ 3-5
 ☐ 5+