

# THE SUCCESSION PLANNING JOURNEY

Succession planning prepares employees to fill vacancies in their organization as others retire or move on. It reduces risks such as knowledge loss, and ensures the long-term health, growth and stability of the organization. Leverage the [Succession Planning Step by Step Guide](#) in the [Workforce Planning Toolkit](#) to create your plan today.

1

## Identify Critical and Vulnerable Positions

- What positions have no identifiable successor?
- Of the positions with no successor, prioritize those that are most critical to the mission.

Leverage the [Succession Planning Tracker Template](#) to help you identify your succession planning priorities



It's important to determine which **positions** are best qualified to succeed other positions rather than individual people.

2

## Develop Eligibility Requirements

- Think about the performance expectations for this position. What selection criteria would be used to fill this position if it were vacant?
- What knowledge, skills, abilities and competencies are needed in this position to achieve success?

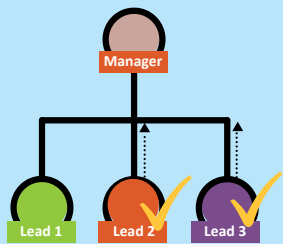
Use the [Succession Planning Profile Template](#) to create a profile of success



3

## Identify A Talent Pipeline

- Identify positions that are well-suited to temporarily transition into the successor position while competitive hiring for a permanent replacement takes place.



4

## Nominate Successors from Qualified Positions

- Identify employees who are recognized as high performers, future leaders, and a good fit with organizational culture and values.



5

## Develop a Succession Plan

- Prepare successor positions with mentoring from the incumbent, knowledge transfer exercises, shadowing and training.
- Leverage [NIH leadership programs](#) to develop successors.

6

## Evaluate



- Succession planning is not a one-time task should evolve with the organization.
- Continually evaluate the succession plan and improve as needed.

