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## Question of the Week

MAY 24, 2023

### Question

We know we need to plan for our leaders to leave the organization. How do we start succession planning?

### ANSWER

It's wise to think about succession planning before you need to fill leadership roles—this will make a potentially stressful time easier to manage. Succession planning prepares your current employees to move into leadership and other critical roles, easing their transition and inspiring confidence in their ability to succeed. Here are a few steps we recommend taking to get started with your succession planning for key positions you've identified:

1. Consider the future needs of the organization by identifying your short- and long-term goals, as well as what roles you will need to achieve those goals.
2. Once you identify the positions that are critical to these future needs, analyze the expertise, skills, and institutional knowledge these roles must have to be successful.
3. Create career roadmaps to facilitate developing employees into these positions. These roadmaps would include any formal or informal training needed, including any time that should be spent with someone currently in the role. This is an opportunity to share the institutional knowledge that isn't always passed along when a role changes hands.
4. Share these roadmaps with supervisors and the employees selected to grow into the roles. Explain the expectations and timeline and allow them to ask questions and provide input. If

applicable, let the employees know it is their choice to take on the challenge.

5. Update career roadmaps as needed. If the goals of your organization change, your succession plans may need to change with them.
6. Periodically check in on employees' progression to provide them with feedback and updates.

You can find more information on succession planning on the platform.

*This Q&A does not constitute legal advice and does not address state or local law.*