

Succession Planning Template

The print-and-circulate companion to our Excel template. Same four registers, same rules. Use this to brief leaders before a review; use the spreadsheet to do the work.

Five rules that keep this honest

- ☐ Criteria before names. Agree what a role requires before anyone is scored against it, or the criteria will quietly describe the person you already have in mind.
- ☐ Every score carries evidence. A number without a sentence behind it reverts to reputation within one review cycle.
- ☐ Ready Now means you would hand over the role rather than run an external search. If that is not true, use a later window.
- ☐ Every development action gets an owner and a deadline. Undated intentions are decoration.
- ☐ Put the review dates on a calendar today: a quarterly touch per critical role, a full review twice a year.

Register 1 — Critical roles

Columns: Role · Business unit · Incumbent · Why this role is critical (cost of vacancy) · Criticality (High / Medium / Low) · Plan owner · Next review date.

Aim for 15 to 30 roles. The test is not seniority: if this seat emptied tomorrow, would leadership drop other work to deal with it? That catches specialists and single points of failure the org chart hides.

The cost-of-vacancy column is the one most teams skip and the one that settles arguments later about which plans get attention.

Register 2 — Candidates and readiness

Columns: Role · Candidate · Current role · Readiness (Ready Now / 1 year / 2-3 years) · one column per leadership dimension scored 1-4 · Evidence (one sentence per score) · Last assessed · Assessed by.

Six example dimensions ship in the spreadsheet: strategic thinking, people leadership, execution, judgment under pressure, financial acumen, stakeholder range. Rename them to fit the roles you actually plan for.

Record who assessed and when. Ratings whose author is unknown cannot be questioned, which means they cannot be trusted either.

Register 3 — Development actions

Columns: Candidate · Gap (dimension) · Exposure assignment · Owner · Deadline · Status · Evidence produced.

This register is the engine. A succession plan without it is a list of names ranked by optimism. Each action should give someone a real piece of the bigger job rather than a course to attend.

Register 4 — 9-box worksheet

Columns: Name · Performance (Low / Medium / High) · Potential (Low / Medium / High) · Evidence for potential (not polish) · Action agreed in review.

The potential axis is where bias concentrates, because it rewards resemblance to current leaders. Requiring written evidence for potential specifically is the cheapest available correction.

When a spreadsheet stops being enough

This file works, and it decays the way every spreadsheet plan decays: no history, no automatic bench view, and nothing enforcing the cadence except somebody's calendar.

The graduation moment is when the quarterly review spends its first half hour reconstructing who changed what:
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