

Succession Planning Risk Assessment



Succession planning is most effective when it identifies where the company is actually exposed, rather than simply listing employees who might someday move into more senior positions. Use this Tool to assess individual positions, not employees. The four-part score measures:

- The potential impact of losing the incumbent.
- The difficulty of finding a replacement.
- How concentrated the critical knowledge is.
- Whether a realistic successor is ready.

Rather than a precise prediction, the resulting should be used as a practical way to identify which positions deserve management attention first. This risk assessment tool is available for download below in both doc and PDF formats.

Instructions: Use this Risk Assessment to identify positions for which the unexpected loss of an employee could create a significant operational, financial, regulatory, or customer-service problem. Complete one assessment for each critical position. For each position, complete the scorecard, identify the day-one backup, assess successor readiness and record specific actions to reduce the risk. Reassess high-risk positions at least annually and whenever there's a significant organizational change.