Succession Planning Transparency Diagnostic

Talent Edge Circle
STAY ON THE EDGE, COME INTO THE CIRCLE

This diagnostic is designed to help you reflect on your organization's current conditions and tendencies related to succession planning transparency. For each question, place a checkmark in the column that best represents your organization. Once complete, review where the majority of your checks fall to see which level of transparency your organization may be leaning toward. Use this as a conversation starter—not a prescriptive answer. Created by Brian Heger. (Excerpt slide from larger slide deck for Talent Edge Circle).

Component / Question	Limited Transparency (Successors not informed)	Partial Transparency (Development focus only)	Full Transparency (Successors informed of roles)
1. Culture: How does our organization view transparency in talent processes?	☐ Confidentiality and discretion are prioritized.	☐ We balance transparency with caution to avoid overpromising.	☐ Openness and clear communication are valued.
2. Succession Process Maturity: How well-defined and consistent is our process?	☐ Early-stage or informal; not consistently applied.	☐ Moderately mature; evolving but with gaps.	☐ Well-established, consistent, and trusted across leaders.
3. Leadership Stability: How predictable are leadership transitions?	☐ Leadership turnover is high or unpredictable.	☐ Some stability exists, but future moves are uncertain.	☐ Leadership is stable, aligned; transitions are well-managed.
4. Accountability: How well do leaders follow through on succession decisions?	☐ Limited accountability; plans are often not followed.	☐ Some accountability exists but uneven across leaders.	☐ Strong accountability; leaders honor succession decisions.
5. Risk Tolerance: How comfortable are we managing risks of disclosure?	☐ Very low—avoid any chance of disappointment or disruption.	☐ Moderate—we accept some risks if benefits are clear.	☐ High—we believe benefits outweigh risks.
6. Retention Needs: How urgent is the need to retain high-potential talent?	☐ Manageable—losing a successor would not be highly disruptive.	☐ Important—retention is needed but not urgent.	☐ Critical—retention is a top priority;disclosure could help.
7. Development Approach: How do we typically frame employee development?	☐ Development is broad and not linked to succession.	☐ We focus on preparing people for future opportunities without naming roles.	☐ Development is role-specific and tied to succession conversations.
8. Employee Expectations: What do employees expect regarding career clarity?	☐ Employees do not expect role-specific communication.	☐ Employees expect development but not specific promises.	☐ Employees expect explicit conversations about future roles.
9. Communication Readiness: How prepared are our leaders to have succession-related conversations?	☐ Not prepared; would create confusion or inconsistency.	☐ Somewhat prepared; could discuss development but not specific roles.	☐ Very prepared; capable of handling role-specific conversations.