

Sample Questions, Metrics, Development Roles, and Triggers

1 Succession Questions

Purpose: Help clarify your organization's approach to succession planning by addressing foundational decisions.

Why it matters: These decisions shape the structure, consistency, and effectiveness of your succession efforts.

1. **Purpose.** What is the main purpose of our organization's SP?
2. **Scope.** Based on our purpose, what is the scope of our SP? Do we focus on roles at certain levels, critical roles regardless of level, etc?
3. **Role. vs Pool.** Are there areas where SP will be based on 'successor pools' —where similar roles are grouped together and share a talent pool of potential successors? If so, what are they?
4. **Future Focused.** How will our SP process plan for roles or capabilities that don't exist today, but needed in the future?
5. **# of Plans.** How many distinct successions plans can a successor be on? How do we handle situations when a person is on more plans than what we deem feasible?
6. **Readiness.** How will we categorize successor readiness? Will we use 'time to readiness' (e.g., 1 year) or focus readiness based on other measures, such as '# of development moves' away?
7. **Development.** If a successor is on multiple succession plans, how do we determine what plan takes priority in terms of successor development?
8. **Transparency.** What is our philosophy on informing a successor that they have been identified as a successor? What do we communicate /don't communicate?
9. **Diversity.** What measures will we take to ensure that our succession pipeline represents the diversity of our organization?
10. **Retention.** For key successors, what's our philosophy on the tactics we will use to proactively retain these individuals?

3 Development Role Audit

Purpose: Guide decisions on whether an individual should transition out of a high-impact development role to make room for developing successors.

Why it matters: These roles are limited and vital for accelerating talent. Keeping someone in place too long can delay development.

1. Is this role considered a key accelerator of leadership development?
2. Has the incumbent been in the role long enough to gain its primary development benefits (typically 18–36 months)?
3. Are they still growing in the role, or have they plateaued in learning?
4. Is there a backlog of high-potential talent who would benefit from development opportunity?

2 Succession Metrics

Purpose: Identify measurable indicators that track progress, effectiveness, and gaps in your succession planning process.

Why it matters: Metrics create visibility, support accountability, and help organizations make data-informed talent decisions.

1. **Plans Created.** % of critical roles that have a plan.
2. **Succession Depth.** Avg. # of successors per critical role.
3. **Coverage.** % of critical roles with a least one ready now successor.
4. **Time to Readiness.** Avg. time (months) until "ready now."
5. **Development Moves.** Avg. # of development moves way from successor being "ready now."
6. **Development Plan.** % of non-ready now successors with a development plan.
7. **Diversity.** % of diverse talent on succession plan (use your org's definition of diverse).
8. **Placement Rate.** % of critical roles filled by succession plan when role is vacant.
9. **Unique Successors.** The # of unique successors vs. to the total # of SP roles (can be a ratio).
10. **Retention Risk.** % of successors deemed high risk.
11. **Turnover.** % turnover in successor pool.
12. **Success Rate.** % success rate of successors after assuming the role (e.g., one year mark).

4 Triggers to Reevaluate Plans

Purpose: List key events or changes that should prompt a reassessment of succession plans.

Why it matters: Succession plans can quickly become outdated if not reviewed in response to shifting business needs and context.

1. Shift in business strategy
2. Industry disruption
3. Significant market expansion or contraction
4. Merger, acquisition, or divestiture
5. Regulatory changes
6. Turnover in the succession pool
7. Significant changes in company size/scale
8. Organizational restructuring
9. Cultural or organizational transformation