



Succession Management 7-Step Process

Worksheet 1.1 – Key Position/Track Identification



Functional Area/Responsible Manager: _____ / _____

Key Position (not Person)	Criteria Code(s)	Disruption Level (✓)		
		L	M	MC
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				

Key Position Criteria Codes

- 1. Specialized KSAs:** Position requires position-specific specialized tacit/proprietary knowledge and/or experience that is only acquired over vast periods of time or through specialized education/training.
- 2. Critical Relationships:** Position requires a large network of influential relationships inside and/or outside of the organization that are both strategically and operationally critical.
- 3. Rare in Market:** Position or classification for which the organization has difficulty finding qualified candidates (despite recruitment efforts).

Disruption Level Codes

Following the Target 1-2-3 succession management strategy, the following codes are used to determine which Key Positions will be on the **One-Ready-Now** track [MC] and which will be assigned to the **Two-in-Three** track [M or L].

One-Ready-Now Track	[MC = Mission Critical] Mission Critical disruption occurs when you have a Key Position with only one person with the KSAs needed (and no <i>ForwardFill</i> person in place) to perform the critical/unique duties that would severely disrupt (or limit) the organization's capability to perform essential functions if the position was vacated. Mission critical disruption is also the designation given if you have an imminent retirement (< 6 months) of a person with extensive tacit/proprietary KSAs.
Two-in-Three Track	<p>[M = Moderate] Moderate disruption occurs when you have a backup for a mission critical position but workload issues now cause other important work to not be completed by the person who is backing up the vacated position. It can also mean an imminent retirement between 6 months and 2 years.</p> <p>[L = Low] Low disruption occurs if a mission critical position is vacated and the work can be (effectively) spread across several individuals (or outsourced). This is also the level of disruption given to an imminent retirement between 2 years and 3 years.</p>