

Succession Self-Assessment

If a critical person told you today they were leaving in six months, what would you wish you had started two years ago? These twelve questions turn that into a scored answer across succession, planning, and the workforce data both depend on.

Score each question: *2 = yes, confidently, from a system*
 1 = partially, or from memory/documents
 0 = no, or don't know

Succession

1. Can you produce a current successor list for your five most critical roles from a live system, without opening a slide deck?
2. Do named successors know they are successors?
3. Does each successor have a development plan that reflects the target role?
4. Has the successor list been validated against actual attrition in the last 12 months (are they all still here)?

Planning

5. Do HR and Finance work from a single workforce planning model?
6. Can you model the workforce impact of a reorganization, acquisition, or growth scenario without building a new spreadsheet?
7. Is your headcount plan connected to role and skills data, or is it pure position math?
8. When plan and actuals diverge, does anyone find out before quarter close?

Workforce data

9. Are the roles in your succession and planning processes the same roles that exist in your system of record?
10. Could you answer “who else in the organization can do this job?” with data rather than opinion?
11. Is there one owner for the quality of the workforce data these processes depend on?
12. If the analyst who maintains your planning spreadsheet left, would the process survive?

Scoring

19–24: Your planning runs as a capability. The next frontier is forward-looking: forecastable gaps and scenario modeling.

12–18: You have process, not intelligence. The plans exist but degrade silently between reviews. This is the most common — and most fixable — position.

0–11: Your succession and planning risk is unmanaged. A single departure is a fire drill. Start with the data foundation, not the planning tool.