

Tips for Creating a Succession Plan

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Posted on February 23, 2022



Your organization does important work and it is thriving. Performance goals are being met, work is efficient, and employees are happy all thanks to the hardworking team of individuals in place right now. But then, life happens. Director X wants to retire, Administrator Y is moving out of state, and Manager Z just wants to embrace the simple life and live on a farm. Whatever the reasons, there will likely be many times in your organization's future when the key employees who make things run like clockwork will need to be replaced. Instead of feeling caught off guard by the departure of key personnel, wouldn't it be nice if your organization already had an idea of what to do? This is where a succession plan can make all the difference.

Succession planning is strategizing on how to fill key roles. Having a succession plan not only helps minimize hiccups during transition, but also helps motivate current employees by exhibiting an organization's commitment to growing its people. Here are some tips to get started.

Key Roles May Not Just Be Leadership Roles: Often when we think of positions in our organizations that we would hate to turnover, those at the top of the pyramid are the first ones that come to mind. However, other positions within our organizations like those with complicated duties or multiple duties should also be considered. A comprehensive succession plan should include all pivotal positions.

Consider Timelines: For each key position identified, take a moment to evaluate how soon you expect each position to turnover. Turnover for some positions may be years away as you plan for the retirement of a key individual. However, other positions may turnover more frequently. For example, maybe there is a particular position within your organization that is

a developmental jumping stone where employees who fill that position are often promoted to other areas. Considering turnover timelines will help structure your actual plan for filling positions. A plan for a one year turnover timeline will look very different than a ten year turnover timeline.

Sourcing Talent: Now that you know what positions you need to fill and when, the next question is, “Where will you look for your next rock star?” Maybe there are certain positions that would be easier to fill from outside the organization; however, one of the real benefits of a succession plan is it forces organizations to look at their existing talent. Existing employees already have a base level of commitment to their organizations and are more likely to succeed in more pivotal roles if given the opportunity and training.

Decide How To Invest In Your People: Finally, the most critical part of your succession plan is to formulate a strategy for preparing those identified for their future roles. Maybe that includes on-the-job training as well as formal technical and soft skill training. Job shadowing and assignment of special projects can also be beneficial in providing an employee with the knowledge and experience they need to master their future position. Do not be afraid to invest the necessary resources to fully prepare an individual for a position. Committing to the development of employees is an immediate payoff, even if they will not fill a key position for several years.

Investing time into a succession plan will benefit any organization for years to come. Succession planning provides organizations with piece of mind so that they know when a critical employee does leave, they are in the best place possible to fill that position. This minimizes the hiccups and learning curves that inevitably come with any turn over, leaving an organization more available to do the work it was created to do.

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