



A HRD's checklist for succession management

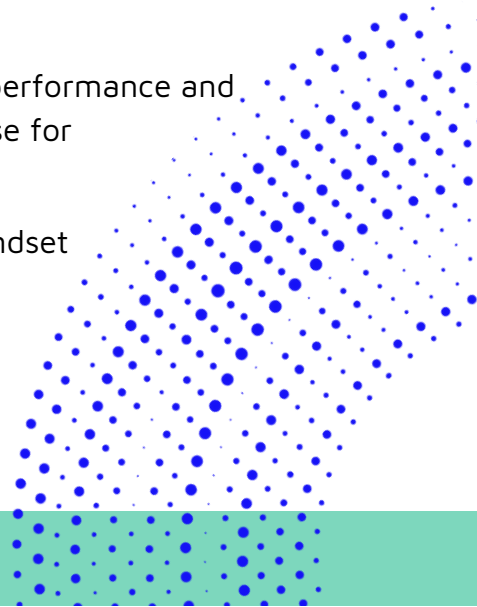
teamwheel™

Succession planning plays a pivotal role in ensuring a smooth transition of leadership within organisations. To help you navigate this critical task, here is a checklist that outlines key steps for successful succession planning.

Assess organisational needs and objectives

- ☐ Understand the long term goals and strategic direction of the organisation
- ☐ Identify key leadership positions and critical roles which require succession planning
- ☐ Use HR tech solutions to gather and analyse data on current and future talent requirements
- ☐ Determine the skills, competencies, and experiences needed for future leaders.
- ☐ Leverage workforce analytics to identify skill gaps, critical roles, and potential succession candidates.
- ☐ Implement succession planning modules within HRIS platforms to streamline data management and reporting.

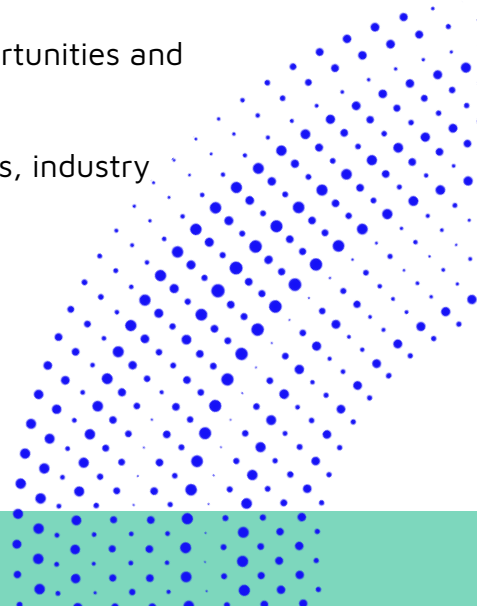
Identify high-potential talent

- ☐ Collaborate with managers and department heads to identify high-potential employees.
 - ☐ Implement a robust talent assessment process to evaluate performance and potential and use talent management software to track these for each employee.
 - ☐ Consider leadership qualities, adaptability, and a growth mindset as criteria for identification and incorporating competency frameworks and talent pools within HR tech systems to facilitate talent identification.
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Develop individual development plans (IDPs)

- ☐ Work closely with identified high-potential employees to create personalised IDPs and utilise performance management tools to align IDPs with performance goals.
- ☐ Leverage learning management systems (LMS) to create and track individual development plans.
- ☐ Align development plans with the organisation's competency framework and future leadership requirements.
- ☐ Include a mix of on-the-job experiences, targeted training programs, coaching, mentoring, and stretch assignments.
- ☐ Provide employees access to e-learning platforms with a wide range of training and development resources.

Provide opportunities for growth and exposure

- ☐ Leverage HR tech solutions to facilitate internal mobility and job rotation programs.
 - ☐ Offer cross-functional experiences to develop a broader understanding of the organisation.
 - ☐ Assign high-potential employees to projects that stretch their capabilities and build new skills.
 - ☐ Use career development portals to showcase available opportunities and encourage employees to explore different roles.
 - ☐ Encourage participation in leadership development programs, industry conferences, and networking events.
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Build a culture of continuous learning

- ☐ Utilise learning experience platforms (LXP) to offer personalised and on-demand learning experiences.
- ☐ Promote a learning culture that encourages employees to embrace professional development.
- ☐ Provide access to relevant learning resources, including online courses, workshops, and webinars.
- ☐ Encourage employees to seek feedback, engage in self-reflection, and pursue continuous improvement.

Implement mentoring and succession coaching

- ☐ Establish formal mentoring programs to pair high-potential employees with senior leaders.
- ☐ Encourage open dialogue and knowledge sharing between mentors and mentees.
- ☐ Provide succession coaching to help prepare employees for future leadership roles.
- ☐ Incorporate feedback and coaching tools within performance management systems to foster continuous improvement.

Regularly review and update succession plans

- ☐ Conduct periodic talent reviews to assess the progress and development of high-potential employees.
- ☐ Adjust succession plans based on changing business needs and emerging talent trends.
- ☐ Engage in ongoing communication with managers and department heads and leverage data analytics to identify potential gaps in the succession pipeline and adjust plans accordingly.



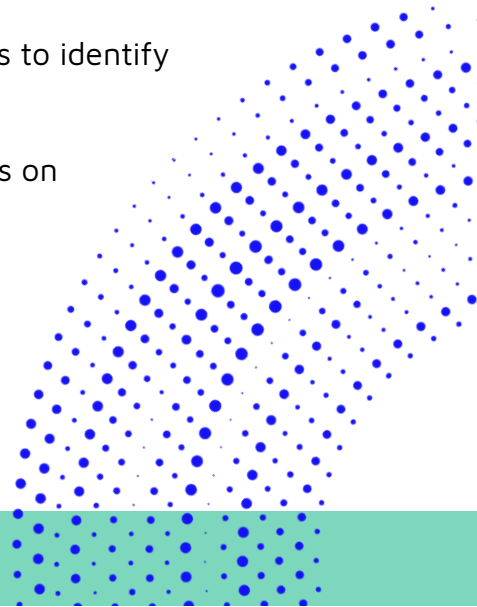
Monitor and evaluate succession planning efforts

- ☐ Establish metrics and key performance indicators (KPIs) to track the effectiveness of succession planning initiatives.
- ☐ Leverage talent management systems to track retention and promotion rates of high-potential employees.
- ☐ Incorporate survey and feedback functionalities within HR tech platforms to collect insights from employees and managers.

Foster a culture of diversity and inclusion

- ☐ Emphasise the importance of diversity and inclusion in succession planning efforts.
- ☐ Ensure equitable access to development opportunities for employees from underrepresented groups.
- ☐ Leverage bias mitigation tools within recruitment and performance management systems to promote fairness.
- ☐ Promote diversity in leadership roles and create pathways for diverse talent to advance.
- ☐ Incorporate diversity and inclusion training modules within learning management systems.

Continuously improve succession planning practices

- ☐ Stay updated on industry best practices and trends in succession planning.
 - ☐ Seek feedback from employees, managers, and stakeholders to identify areas for improvement.
 - ☐ Seek feedback from employees, managers, and stakeholders on the effectiveness of HR tech tools.
 - ☐ Regularly review and optimise HR tech platforms to ensure they align with evolving succession planning needs.
 - ☐ Regularly review and refine the succession planning process based on lessons learned.
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With a focus on leveraging HRIS tools, the checklist offers guidance on how to strategically utilise technology to support succession planning efforts. By implementing HRIS systems, HRDs can streamline talent management processes, track employee performance and potential, identify skill gaps, and create targeted development plans. These tools enable HR professionals to make data-driven decisions, ensure a smooth transition of leadership, and mitigate risks associated with succession planning.

Team Wheel, a trusted HR consultancy, is dedicated to supporting HRDs in their succession planning initiatives. Our expertise lies in helping businesses leverage HRIS technologies to optimise their succession planning strategies. With years of experience in the field, our team of experts can assist you in selecting, implementing, and maximising the potential of HRIS tools to drive successful succession planning outcomes.

If you have any questions, require personalised guidance, or would like to explore how Team Wheel can support your succession planning efforts, please don't hesitate to reach out to us. You can contact us at info@teamwheel.co.uk or visit our website www.teamwheel.co.uk to learn more about our services and how we can assist you in achieving your succession planning goals.

Trust Team Wheel to be your partner in navigating the complexities of succession planning and unlocking the full potential of HRIS tools to drive organisational success.

Contact Team Wheel today and take the next step towards building a robust succession plan tailored to your organisation's unique needs.

