



Succession Assessment and Planning Tool

Employee: _____ Position: _____

Talent Loss Impact

Position profile

- High
- Medium
- Low

Ability to fill internally

- High
- Medium
- Low

Scope of Impact

- technical expertise
- replacement challenge
- expense/productivity
- culture/morale
- public relations
- competitor advantage

Internal Opportunities: talent/experience readiness

- Immediate: *employee:* _____
- 1-2 years: *employee:* _____
- 3-5 years: *employee:* _____
- 5+ years: *employee:* _____

Loss Profile: summary of tangible and intangible considerations

Narrative comments: