



Succession Planning Questions

1. Identify Critical Roles

These are roles that would seriously impact the business if left vacant.

Questions to ask:

- Which roles are central to business continuity, strategy or revenue?
 - Which positions hold unique knowledge or relationships?
 - What risks does the business face if this role is suddenly vacant?
 - Is this role becoming more important within the next 1-3 years?
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2. Define Success Profiles for Each Role

Outline what “great” looks like, not just what the job description says.

Questions to ask:

- What are the essential capabilities, leadership traits and behaviours?
 - What business outcomes does this role need to deliver?
 - What level of complexity and scope must someone be able to handle?
 - What future skills will be important as the business evolves?
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3. Assess Internal Talent

Explore who could realistically step into each role now or with development.

Questions to ask:

- Who is performing strongly and showing leadership potential?
 - Which team members could grow into this role within 1-2 years?
 - What is their readiness level? (ready now / ready soon / future potential)
 - Are we assessing capability based on evidence, not familiarity or bias?
 - Who has demonstrated adaptability and strategic thinking?
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4. Identify Gaps and Development Needs

Focus on skill, experience and capability gaps, not just job titles.

Questions to ask:

- What does each potential successor need to learn to be ready?
 - Are there stretch projects, secondments or acting opportunities available?
 - What training or coaching would fast-track them?
 - What exposure do they need—board, stakeholders, financials, change leadership?
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5. Strengthen Your Leadership Pipeline

Plan for a healthy flow of talent at every level, not just the top.

Questions to ask:

- Do we have enough people in the pipeline for the next 3–5 years?
 - Where are the biggest risk points? (single incumbents, niche skills, retiring leaders)
 - Do we have diversity in our pipeline—skills, thinking styles, backgrounds?
 - Are we attracting and retaining the level of talent we need?
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6. Consider External Options

Succession planning isn't only internal—sometimes the best option is to look outward.

Questions to ask:

- Would an external hire bring needed skills the organisation lacks?
 - What roles benefit from external perspective versus internal continuity?
 - Do we have a go-to strategy for sourcing external leaders quickly if needed?
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7. Build a Transition Plan

Make sure there's a clear, low-stress handover process.

Questions to ask:

- What knowledge needs to be transferred before a transition happens?
 - How will we manage shadowing, acting roles or phased handovers?
 - Who needs to be involved in stakeholder introductions?
 - What communication is needed to maintain stability for teams?
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8. Review and Update Regularly

Succession is not one-and-done—it shifts as the business shifts.

Questions to ask:

- Has the role changed in scope or complexity?
 - Has talent performance or readiness changed?
 - Have new strategic priorities emerged?
 - Are we reviewing succession plans at least twice a year?
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9. Risk Management Considerations

Stay ahead of vulnerabilities.

Questions to ask:

- Where do we have key-person risk?
 - Which roles would cause the biggest disruption if vacant?
 - How quickly could we fill each role?
 - What contingency plans exist for sudden departures?
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10. Governance and Transparency

Make sure leaders know the process and expectations.

Questions to ask:

- Who owns succession planning—HR, the board, executive leadership?
- How transparent should we be with individuals identified as successors?
- How are succession decisions documented and reviewed?
- Are we ensuring fairness, objectivity and diversity in decision-making?