



**CARICHAM**  
Centre of Excellence



# OPERATIONAL EXCELLENCE

## Succession Planning Checklist



## Determine the key positions

- If left vacant, it would be detrimental to the business
- Vulnerable

## Determine the capabilities needed

- Establish selection criteria
- Set performance expectations

## Identify interested employees

- Inform employees about the positions and requirements. Advertise.

## Start the recruitment process

## Develop a knowledge transfer plan

## Appoint a successor

- Discuss career plans and interests
- Define the learning, training and development needs
- Link learning, training and development plan to job requirements

## Hand over the job

## Document the transition

## Evaluate and monitor the plan