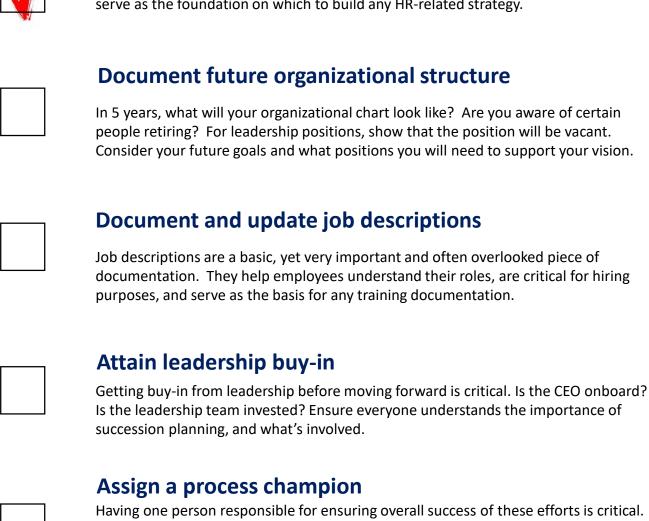# Pre-Succession Planning Checklist

Before beginning the succession planning process, it's critical to have the following basic organizational documents completed. In addition, some pre-project planning tasks such as identifying the project champion, will ensure success of the entire succession planning project. Read below for more information.

## Document current organizational structure

Do you have an organizational structure? Is it documented? This is important for any company, as it provides clarity on roles and reporting relationships. Org structures serve as the foundation on which to build any HR-related strategy.

## Document future organizational structure

In 5 years, what will your organizational chart look like? Are you aware of certain people retiring? For leadership positions, show that the position will be vacant. Consider your future goals and what positions you will need to support your vision.

## Document and update job descriptions

Job descriptions are a basic, yet very important and often overlooked piece of documentation. They help employees understand their roles, are critical for hiring purposes, and serve as the basis for any training documentation.

## Attain leadership buy-in

Getting buy-in from leadership before moving forward is critical. Is the CEO onboard? Is the leadership team invested? Ensure everyone understands the importance of succession planning, and what's involved.

## Assign a process champion

Having one person responsible for ensuring overall success of these efforts is critical. This person will hold people accountable for their action items on the master implementation plan.