

# Succession Planning Document

HR & WorkTech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

## Background

Builds a structured succession plan — role criticality, incumbent risk, potential successors and readiness, interim cover and development actions — with talent-assessment criteria. Use it to plan continuity for key roles. For key-person risk specifically, use the Critical-Role Risk Map.

## Purpose of this tool & output

Describe your org structure and key roles and we build a succession plan with talent assessment criteria

## How the output is used

Use it to build a succession plan with talent-assessment criteria for your key roles.

## Important cautions

AI-generated succession framework. Validate with leadership and conduct formal talent reviews before acting.

## Companion documents

- 9-Box Talent Grid Builder
- Career Pathing Framework
- Critical-Role Risk Map
- Leadership Development Plan
- Internal Mobility Policy

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.