

Succession Planning Forecast Format

Department/Division:

Date:

____/____/____

Key Position Succession Forecast

Key Position	Incumbent	Potential Successors	Readiness Timeframe	Development Needs	Comments
Finance Manager	Jane Doe	John Smith, Emily Chen	1-2 Years	Leadership training, cross-department exposure	Internal candidates identified
Operations Lead	Michael Lee	Priya Patel	Ready Now	None	Pipelined for promotion
IT Director	Vacant	Sarah Brown	3-5 Years	Project management certification	External recruitment may be considered

Succession Risk Assessment

Position	Risk Level (High/Med/Low)	Action Plan
Finance Manager	Low	Continue development of internal successors
Operations Lead	Low	Succession transition within 6 months
IT Director	High	Initiate search for external candidates; mentor internal talent

Important Notes:

- This document should be reviewed and updated at least annually or when significant role changes occur.
- Consider both internal and external candidates for key positions where appropriate.
- Track development needs and ensure alignment with individual development plans.
- Maintain confidentiality and use this document for strategic planning purposes only.
- Engage leadership to validate succession readiness and risk assessments.