

Succession Planning Worksheet

Position

Primary Responsibilities

*Task done weekly, monthly, quarterly. Task that are essential to operations

Include how often task should be done

Secondary Responsibilities

*Task done at least annually.

Basic Skills Needed

Certification, educational requirements, experience

Current Back up

Person (by Position) with some understanding or training
If no back up-write N/A

**Cross training
needs**

**Further
Resources
needed?**

Trainings, staffing needs