Succession Planning: Pipeline Identification Worksheet

Use this worksheet to help you think through potential successors who might fill a critical role (on a temporary or permanent basis) in the event of a vacancy. Feel free to edit this form in any way to make it as useful as possible.

After completing this worksheet, consider using the Learning Plan Template to create a plan to address development needs of potential successors.

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| Critical Role: |

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| **Potential Successor Name:** |  |
| **Current Position:** |  |
| **Strengths:** |  |
| **Development Needs:** |  |
| **Next Steps:** |  |
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| **Current Position:** |  |
| **Strengths:** |  |
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