



# Decision Point™ by Decision Associates

1540 East Lake Road | Suite 100 | Erie, PA 16511 | Phone: 814.528.9400 | Fax: 814.528.9401 | www.DecisionAssociates.net



<p style="text-align: center;"><b>Owner/CEO Succession Readiness Assessment</b></p>	<p style="text-align: center;"><u>Scale</u> 4 = Excellent 3 = Fair 2 = Poor 1 = Unprepared</p>
I have been educating myself on succession and benchmarking others.	
I have identified a Successor and they are on a structured development track to be ready.	
I am clearly communicating our Vision, Strategy and Objectives to my team <u>and</u> they are engaged.	
I understand our culture and how it contributes to our competitive performance.	
I have <u>clearly</u> cataloged and defined:	
<ul style="list-style-type: none"> <li>• My 5 most important <u>contributions</u> to the business.</li> </ul>	
<ul style="list-style-type: none"> <li>• The 5 most important <u>types of knowledge</u> that I bring.</li> </ul>	
<ul style="list-style-type: none"> <li>• My 5 most <u>important Leadership, Management and Strategic Thinking</u> attributes that this business depends upon.</li> </ul>	
<ul style="list-style-type: none"> <li>• <u>My critical relationships</u> with customers, suppliers, industry experts, banks, professional firms, etc., that the business depend upon.</li> </ul>	
<ul style="list-style-type: none"> <li>• The ways in which I manage employee relationships to keep the team functioning well.</li> </ul>	
<ul style="list-style-type: none"> <li>• My contribution to the <u>culture</u> of this business and the negative impact of my departure.</li> </ul>	
<ul style="list-style-type: none"> <li>• My contribution to the <u>competitiveness</u> of this organization.</li> </ul>	
<ul style="list-style-type: none"> <li>• The <u>ways in which our competitors would gain</u>, when I leave.</li> </ul>	
If something happens to me:	
<ul style="list-style-type: none"> <li>• I have someone in place who could continue to grow the business and keep it competitive.</li> </ul>	
<ul style="list-style-type: none"> <li>• At the end of a year, the <u>value</u> of the business would: Increase? Decrease?</li> </ul>	<p style="text-align: center;">_____ %</p>

# Key Staff Succession Assessment Worksheet

## Succession Attribute

Scale

4 = Excellent  
3 = Fair  
2 = Poor  
1 = Unprepared

I have identified the key people whom this business could least afford to lose. Their names are:

\_\_\_\_\_

\_\_\_\_\_

For each, I have identified and clearly understand the following:

- The 5 most important contributions each makes to this business.
- The 5 most important types of knowledge that each brings to the business.
- Their 5 most important Leadership, Management and Strategic Thinking attributes.
- Their critical relationships with employees, customers, suppliers, industry experts, banks, professional firms, etc.
- Their contribution to the culture of this business and the negative impact of their departure.
- Their contribution to the competitiveness of this organization.
- The ways in which our competitors would gain if this person left us.

We have a good cross training program at all levels

We are documenting key knowledge and intellectual property

I have a “replacement in training” for each of the key people.

I am convinced that the replacements will be doing an excellent job.

I have identified the gaps between the key persons and their replacement.

I have a plan to address the gaps: training, development, education, coaching, mentoring.

The replacements are ready to “step in” tomorrow.

--	--

