

**Succession Planning Summary (Sample)**

7/1/02 – 6/30/03

<b>Key Position</b>	<b>Incumbent</b>	<b>Years in Position</b>	<b>Primary Functions</b>	<b>Key Competencies</b>	<b>When Vacant, Probability</b>
<b>Director of Administration</b>	Robin Edwards	3.5	Runs annual planning process and budgeting. Manages administrative support unit. Facilities coordinator. Agency purchasing	Strategic planning, forecasting and budgeting Negotiating Problem-solving Coaching/Mentoring Team Building	2 years, 25-50% probability
	<b>Candidates</b>	<b>Years In Position</b>	<b>Current Organization/Position</b>	<b>Development Required</b>	<b>When Ready</b>
	Chris Anderson	2	Customer Service/ Senior Customer Service Rep	More experience with budgeting. Experience running multi-level organization	2 – 3 years
	Fran Gordon	5.5	Operations Consulting/ Consultant	Training in strategic planning and budgeting. Purchasing experience. Mentoring capability uncertain	3 years

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<b>Director of Operations</b>	Fran Jackson	4	Meet production deadlines. In conjunction with Consulting/Customer Service, develop new products. Quality control and improvement	Process design, measurement and improvement. Production management. Innovation through technology. Team building	1 year, 70% probability
	<b>Candidates</b>	<b>Years in Position</b>	<b>Current Organization/Position</b>	<b>Development Required</b>	<b>When Ready</b>
	Chris Anderson	2	Operations/Shift Manager	Experience running multi-shift operation. Advanced process management techniques. Business writing and presentations	2 years
	Gerry Williams	6	Operations Consulting/Consultant	Interpersonal skills/negotiations. New production technology Supplier management. Experience running multi-shift operation	3-4 years