

Succession Map Template



Use this worksheet to map out your succession plan — from potential successors to knowledge handover.

1. Succession Vision

What does a successful succession look like for you and the business?

2. Key Roles to Be Transitioned

List the key responsibilities or roles you currently hold that need to be transitioned.

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3. Potential Successors

Who are the individuals you're considering for succession? List strengths, gaps, and readiness.

- Name:

Strengths:

Gaps:

Readiness Score (1–10):

4. Timeline for Transition

What is your ideal timeline to begin and complete the handover?

Start Date:

Midpoint Review:

Planned Completion:

5. Handover Plan

Outline your steps for transferring knowledge, authority, and trust.

- Training & Mentoring Plan:
- Gradual Handover Milestones:
- Final Transition & Communication:

6. Support Systems Required

What support, advisors, or external help might be needed to ensure a smooth transition?

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Tip: Review this document every 6–12 months and update it as needed.