

## Sample - Tool for Identifying Critical Positions and Risk Assessment

Manager: \_\_\_\_\_

Department: \_\_\_\_\_

Date: \_\_\_\_\_

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### ***Introduction***

Succession planning is the strategic alignment of an organization's talent with its business direction. More specifically, it is a systematic process for identifying talent requirements and implementing focused strategies to attract and develop pools of qualified candidates to fill critical positions within an organization. Succession planning also involves strategies to ensure talent retention and engagement, and to facilitate the timely transfer of knowledge from incumbents to successors

The purpose of this interview is to identify factors that may have an impact on talent requirements in your organization, and identify the critical positions under your purview that should receive priority in the succession planning process. It is a "best practice" in succession planning to identify critical positions in order to focus efforts and prioritize the allocation of resources. By managing our most critical risks first, we will ensure that leadership continuity is in place to sustain the achievement of business results and the delivery of public services. We will also build confidence in the succession process so that, similar to strategic and operational business planning, it will become embedded as an ongoing and valued process in our organizations.

### ***Implications of Current and Future Business Strategy***

1. What internal and external business drivers exist that may affect your mission, strategic goals/objectives, strategies or structure over the next five years?
2. What are the key workforce implications of these changes? What specific occupational groups or positions may be affected? What changes do you foresee in the skill sets or competencies required to perform effectively in your organization?

**Questions to Identify Critical Positions**

1. What positions (are instrumental to delivering on the business' commitments and corporate priorities (i.e. performance agreements)?


2. What positions exert critical influence on achieving operational and strategic goals (i.e. business plans)?


3. What positions are essential in meeting legislative or regulatory requirements?


4. What positions are instrumental to the health, safety or security in the workplace?

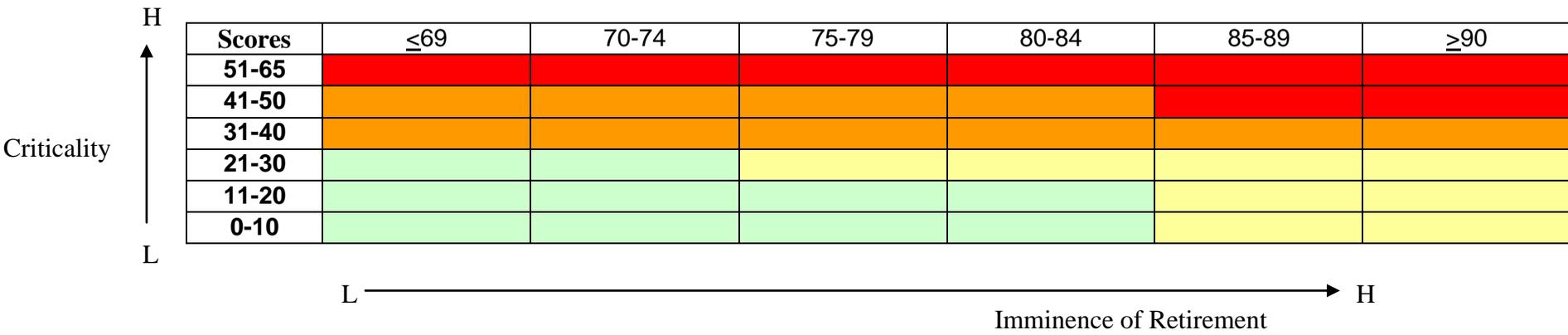

*Identify additional positions on a separate sheet if required.*

Please complete a copy of this form for each critical position that has been identified.

**Position:** \_\_\_\_\_

<b>Please indicate the extent to which you agree with the following statements using the 0-5 scale where 5 means that you strongly agree.</b>	Strongly disagree	Disagree	Disagree Somewhat	Agree Somewhat	Agree	Strongly agree
1. If this position were left vacant, it would cause serious difficulties in delivering on commitments and corporate priorities.	0	1	2	3	4	5
2. If this position were left vacant, it would cause serious difficulties in achieving operational and strategic goals at the department level.	0	1	2	3	4	5
3. If this position were left vacant, it would cause serious difficulties in meeting legislative or regulatory requirements.	0	1	2	3	4	5
4. If this position were left vacant, it would be detrimental to the health, safety or security in the workplace	0	1	2	3	4	5
5. There is a significant likelihood that the incumbent will leave this position within the next 2-3 years.	0	1	2	3	4	5
6. The skills & competencies required to perform this position are highly sought after in the labour market.	0	1	2	3	4	5
7. This position tends to have a high turnover rate.	0	1	2	3	4	5
8. This position would be difficult to fill because it requires specialized expertise and experience that is not readily available in the organization or the labour market.	0	1	2	3	4	5
9. This position would be difficult to fill because of its location.	0	1	2	3	4	5
10. This position would be difficult to fill because of language requirements.	0	1	2	3	4	5
11. This position requires a high degree of specialized/corporate knowledge transfer to ensure continuity in the performance of the function.	0	1	2	3	4	5
12. There is no internal feeder pool for this position with candidates who could be ready to step up if it becomes vacant.	0	1	2	3	4	5
13. There is no corporate feeder pool for this position with candidates who could be ready to step up if it becomes vacant.	0	1	2	3	4	5
<b>Criticality score</b>	0-10	11-20	21-30	31-40	41-50	51-65
<b>Imminence of retirement: incumbent age + service =</b>	≤69	70-74	75-79	80-84	85-89	≥90





Guidelines for prioritizing positions for succession planning

	Imperative
	Important
	Discretionary
	Not urgent