

Succession Intervention Evaluation Tool



Note on Use

This tool provides HR leaders a step-by-step process for pinpointing jobs most vulnerable to retirements. It includes instructions for analyzing age data as well as considerations for determining which positions truly warrant formal succession planning.

Step-by-Step Instructions

- 1 Calculate average age of employees by job title or management level.
- 2 Sort titles in descending order of age and pinpoint top 10-15 titles with oldest employees.
- 3 For individuals with these titles, directly survey current jobholders or interview supervisors to determine what percentage of these employees plan to retire within the next two years.
- 4 For those planning to retire in the next two years, consider the following factors to determine if formal succession planning is necessary for the position:

Volume of Potential Departures

- Are multiple individuals holding the same title planning to retire within a similar timeframe?

Strength of Existing Pipelines

- Are there already strong internal (junior-level roles, cross-trained staff from other departments) or external pipelines in place for this role?
- If so, will these pipelines, at current course and speed, produce enough candidates to meet the need created by retirements?
- Does HR need to take measures to increase existing pipelines or target new labor pools?

Future Importance of Role

- Will this role be more or less important in the future?
- Are there any plans to phase out or outsource this role?

Interpreting Results

Job title with few near-term retirements, strong pipelines, or decreasing importance may not require formal succession planning.

- 5 For remaining titles, HR should develop customized retention plans for each incumbent while simultaneously grooming successors.

▶ Access this tool: [advisory.com/hrac/successionmanagement](https://www.advisory.com/hrac/successionmanagement)