



## Creating Your Own Succession Plan

You probably know that many large companies and family businesses go through succession planning. But, have you ever thought about writing your own succession plan? It doesn't need to be formal—just an outline of the most important aspect of your job so someone can fill your shoes when you move on, take an extended vacation or have an unexpected medical leave.

Here are some key tasks to help you draft your own succession plan.

**Outline your file structure.** Whether you have only digital files only, or computer and paper files, make notes on your organizational system. For digital files, you can even print out your file structure. Label your paper files to help identify important projects.

**List monthly deadlines and commitments.** Most of us have ongoing monthly meetings or deadlines. Make a list of these obligations and briefly describe them. You can include a sample report to make things even easier for your successor or temporary replacement.

**Detail your team and committee responsibilities.** Some people play several different roles within an organization. Take the time to list the teams you're on, the other team members, and who convenes the meetings. Don't forget to include the goal or purpose of the team and when you meet.

**Include a list of abbreviations.** All companies have their internal abbreviations and jargon. Start compiling those terms that an outsider wouldn't understand.

**Make notes in your Rolodex or print your contact file.** Include all internal key contacts and outside contractors, consultants and suppliers. If someone in finance helps you with your budget or a particular employee in marketing creates all your brochures, include that information.

**List your Web bookmarks or favorites.** If you find some Web sites particularly useful for your job, be sure to include them in your plan. Perhaps you've subscribed to a particular site and have a login and password

to remember. If they're not confidential, include them in your documentation.

**Include general administrative documents.** An organizational chart, annual report, strategy plan, or other report can be useful in helping someone understand your job and position. Copies of standard reports or forms would also shorten someone's learning curve. Don't forget a copy of your job description.

**Describe your regularly-scheduled tasks.** Break your job into daily, weekly and monthly tasks. You don't need to be too detailed, but providing bullet points about your ongoing responsibilities will certainly be helpful.

Hopefully this will get you started. But, if you're looking for someone to create a more detailed description of your duties, tasks and competencies, give me a call.

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