

Human Resources

Business Succession Planning Course Outline:

Module One: Getting Started

- Icebreaker
- Housekeeping Items
- The Parking Lot
- Workshop Objectives

Module Two: Succession Planning Vs. Replacement Planning

- What is Business Succession Planning?
- What Is Replacement Planning?
- Differences Between
- Deciding What You Need

Module Three: Preparing for the Planning Process

- How to Set Parameters for the Planning Process
- Should You Establish a Committee?
- How to Gather Operational Data

Module Four: Initiating Process

- Develop a Mission Statement
- Develop a Vision Statement
- Choosing to Be a Mentor

Module Five: The SWOT Analysis

- Identifying Strengths
- Identifying Weaknesses
- Identifying Opportunities
- Identifying Threats

Module Six: Developing the Succession Plan

- Prioritize What the Succession Plan Will Address
- Set Goals and Objectives
- Develop a Strategy for Achieving Goals
- Draft the Plan

Module Seven: Executing the Plan

- Assign Responsibility and Authority
- Establish a Monitoring System
- Identifying Paths
- Choosing Your Final Approach

Module Eight: Gaining Support

- Gathering Data
- Addressing Concerns and Issues
- Evaluating and Adapting

Module Nine: Managing the Change

- Developing a Change Management Plan
- Developing a Communication Plan
- Implementing the Plans
- Providing Constructive Criticism
- Encouraging Growth and Development

Module Ten: Overcoming Roadblocks

- Common Obstacles
- Re-Evaluating Goals
- Focusing on Progress



Module Eleven: Reaching the End

- How to Know When You've Achieved Success
- Transitioning
- Wrapping it All Up

Module Twelve: Wrapping Up

- Words from the Wise
- Review of Parking Lot
- Lessons Learned
- Completion of Action Plans and Evaluations