



## INTRODUCTION TO SUCCESSION PLANNING PILOT PROCESS

OFM/SHR is prepared to rollout a succession planning (SP) pilot on **Monday, November 2, 2020** for interested state agencies to assist and support agency leaders in planning for succession management.

The SP pilot will consist of several agencies using a simple, 5-step toolkit. We have developed an easy, straight-forward and low time-commitment toolkit which includes worksheets, templates and tips for agencies to:

- Tie succession planning to business strategy and goals.
- Understand the importance of engaging executive and senior leaders in the process.
- Develop key talent.
- Ensure staff understand their role in the process and know what we expect from them.

The expectation to participate in the pilot is to utilize the toolkit from beginning to end on any critical role of your choice and complete the process within a 90 day window (**completed by February 1, 2021**). The three main components to be fulfilled are:

1. Complete an agency participant pre-survey
2. Complete the 5-step process outlined in the toolkit (on at least one critical need or role)
3. Complete an agency participant post survey

**Before** you begin the SP process, please thoroughly review the following:

- Gartner Corporation's 'Building Sustainable DI' (embedded 'DI' into succession management example)
- Succession Planning Toolkit
- Resources (see embedded links within toolkit)
- Pre & Post pilot survey questions

Once you've confirmed that your agency will participate in the pilot, we will add your organization to our SP tracker located on our Succession Planning Pilot SharePoint as a way to capture your progress and feedback.

To learn more about the Succession Planning Pilot, please contact **Don Chavez** at [don.chavez@ofm.wa.gov](mailto:don.chavez@ofm.wa.gov) or call 360-688-8489.

