



Action Guide

Step 4: Identify Successor Candidates

Now it's time to apply Step 4 to your health department by evaluating your talent pool and identifying successor candidates.

1. Establish Shared Understanding of the 9-Box Grid

Before grouping employees, ensure the 9-Box Grid reflects shared understanding.

2. Create Talent Pool Categories

Next, translate individual grid placements into broader, actionable talent pool categories by agreeing on which 9-Box Grid placements roll up into each color-coded category, then assign each employee to a category.

3. Assess Talent Pool Coverage

For each prioritized role from Step 1, identify which talent categories currently align to the role by discussing:

- Do we have “Ready Now” coverage?
- Are we overly dependent on one individual?
- Where are our greatest gaps?

4. Pair Talent Readiness with Role Requirements

Now, pair talent readiness with role requirements by reviewing role profiles from Step 2 alongside color-coded talent pool categories created from the 9-Box Grid.

For employees in “**Ready Now**” and “**Ready Soon**” categories:

- Identify which role competencies are already demonstrated
- Identify gaps that would need to be addressed before nomination

For “**Future Potential**” and “**Core Contributors**”:

- Discuss long-term alignment and development needs



5. Identify Potential Successors

Identify which employees are ready to be nominated as potential successors in Step 5.