



Action Guide

Step 5: Develop Successor Readiness

Now it's time to apply Step 5 to your health department by implementing your succession planning by nominating successors and creating, then launching an action plan.

1. Review Your Succession Planning Information

- Completed 9-Box Grid from Step 4
- Role Profiles for prioritized positions from Step 2
- Agreed-upon talent pool categories and readiness definition

2. Document Successor Nominations

For each prioritized position, use your decision table to document successor nominations.

- Identify one or more potential successors per prioritized role
- Assign a readiness timeline (Ready Now, Ready Soon, Future Potential)
- Identify strengths aligned to the role profile
- Document development needed
- Assign a nomination status (i.e. Primary, Secondary, Development Only)

3. Develop the Talent Pool

Determine how nominated successors and the broader talent pool will be developed. Identify development strategies.

- Review the 9-Box Grid categories and brainstorm development strategies for each group
- Select development approaches that are realistic, equitable, and aligned with organizational capacity



4. Create Action Plans

Translate development into actionable plans. Document:

- Development strategy
- Specific development tasks or opportunities
- Responsible party (employee, supervisor, leadership)
- Timeline
- Method for tracking progress

5. Confirm Readiness to Implement

Before moving forward, confirm readiness to implement.

- Identify what information will be shared.
- Confirm leadership alignment on messaging
- Establish a start date for implementation strategies