



Succession planning templates

Talent bench review (developed by [The Anderson Leadership Group](#))

Instructions and legend:

Performance level — WHAT the employee does and HOW they do it. Rate each employee relative to the following criteria:

- I. Weak performer
- II. Solid performer
- III. Strong performer

Ultimate potential level — The job level the individual is capable of attaining, provided continued performance and development (under best possible conditions). Consider raw ability, motivation to succeed, and commitment to group or organization.

- I. Current role only or possible bad fit
- II. Good fit at current level, lateral move, or upward 1 level
- III. Upward mobility more than 1 level

Readiness — Consider the individual's learning needs and potential when making this judgment

- I. Needs greater than 12 months to develop to next move
- II. Should develop in current role for more than 12 months before next move
- III. Can take next development step within next 12 months



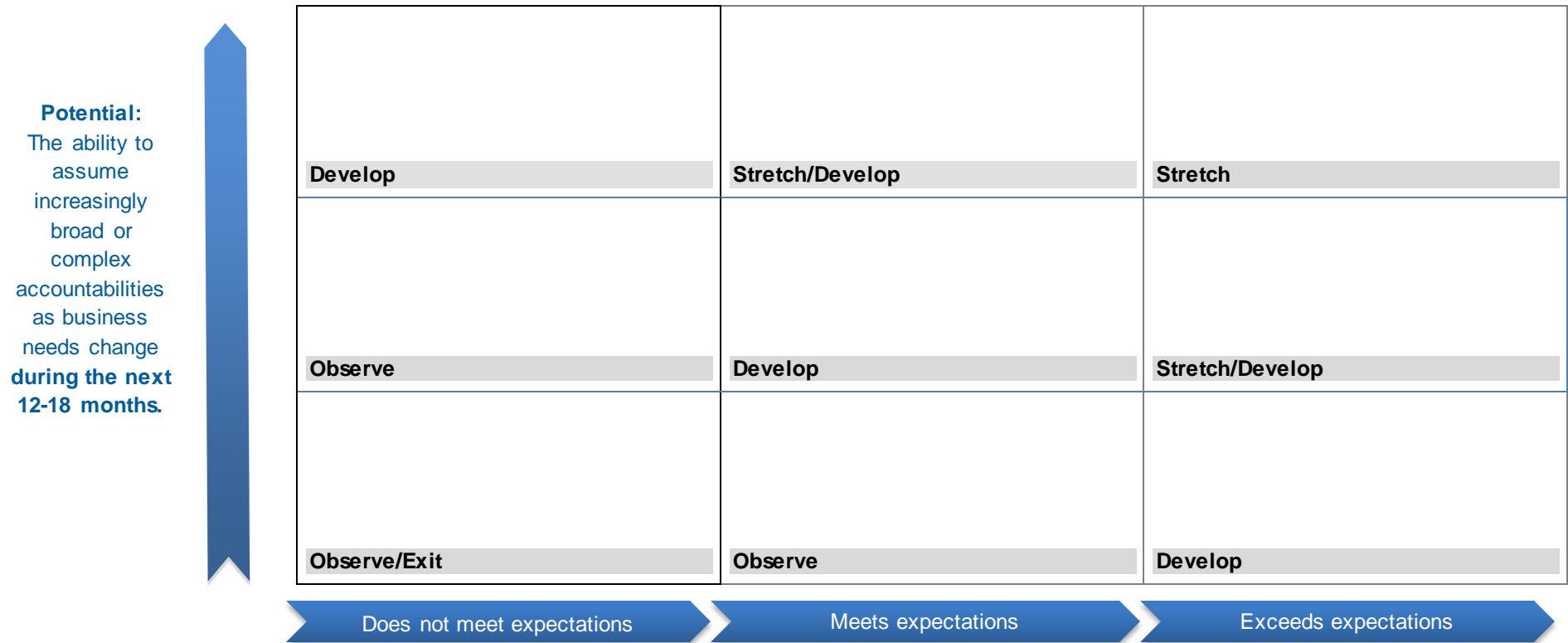
Talent bench review form

	Direct report name	Performance level	Ultimate potential level	Readiness		
				I	II	III
1	Sample: John Smith	III	II		√	
2						
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9-box grid template

Instructions:

Here you will take the information from the Talent bench review form and plot employee performance against potential. Working collaboratively arrange every employee into one of nine types across a vertical and horizontal axis, based on three levels of performance and three of potential. The 9-box grid guide on the next page provides more insight and recommended actions.



Performance (based on current job): The extent to which the individual:

- a) Delivers business/functional results
- b) Demonstrates core competencies
- c) Acts in the spirit of the companies values

9-box grid guide

Potential:
The ability to assume increasingly broad or complex accountabilities as business needs change during the next 12-18 months.

<p>May be an individual who has recently been promoted and hasn't had the opportunity to demonstrate higher performance. Focus on coaching and a solid development plan. In an individual that has been in this role for some time, there may be a serious issue (derailer).</p> <p>Develop</p>	<p>A valuable asset for the future. There is still room for maximizing performance in current role; potential may not be fully realized yet. Focus on increasing performance contribution to high, after which greater challenge and/or broader scope are likely.</p> <p>Stretch/develop</p>	<p>Has mastered current role and is ready (and anticipating) a new challenge. Next steps are to provide greater scale and/or scope or a new assignment, which will stretch them in a significant way or will provide new or missing skills. Retention is critical. These are future leaders of the company.</p> <p>Stretch</p>
<p>Shows some potential but performance is considered low. Focus on reasons for low performance and actions to improve it. If there isn't an improvement, potential should be reassessed and a performance improvement plan put in place.</p> <p>Observe</p>	<p>Has potential for increased accountabilities and is meeting current performance expectations. Development focus: Increase performance contribution to "high" will further assessment of potential growth.</p> <p>Develop</p>	<p>Is exceeding performance expectations and is a good candidate for growth and development. Employee development should focus on specific gaps – i.e. what is needed to broaden or move to the next level of responsibility.</p> <p>Stretch/develop</p>
<p>Not meeting performance expectations and demonstrates limited potential. Focus should be on significant performance improvement or finding a more suitable role (internal or external).</p> <p>Observe/exit</p>	<p>Consistent contributor, but shows limited potential. Focus on maximizing performance while assessing future potential and/or a more suitable role. May need a plan for a successor. In some cases, if performance declines or is blocked, retention may be reviewed.</p> <p>Observe</p>	<p>A strong performer but unlikely to move to a higher-level role. Engagement will be important for continued motivation and retention. May be of real value for developing others. Professional, business or content experts may fall into this box.</p> <p>Develop</p>



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