# SUCCESSION PLANNING WORKSHEET- TEMPLATE

**Date Prepared:** _____ **Timeframe of Plan:** _____ **to** _____

| STEP 1: Identify the Risks | | | | |
|---|---|---|---|---|
| **List key positions within your funeral home.** | **A. Rate Position Impact.** What would the impact be on the funeral home of this position becoming vacant? Consider function of the position as well as any unique capabilities of the incumbent(s). | **B. Rate Vacancy Risk.** What is the likelihood of this position becoming vacant over the next 3 years? | **C. Identify High Risk Positions.** Multiply A. Position Impact X B. Vacancy Risk. High risk positions are those with a score of 12 or greater. | **Comments/Notes.** |
| | (Rating Scale: 5 = High, 3 = Moderate, 1 = Low) | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |