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)			