

# 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)			