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## Overview

This standard is about managing succession planning for an organisation, in order to identify and manage people opportunities and risks within the organisation. It includes developing and agreeing a succession planning process and methodology that is integrated with other HR processes and implementing and evaluating the process and methodology. It is for HR professionals who are involved in the management of succession planning.

**Performance  
criteria**

- You must be able to:*
- P1 Develop and agree a succession planning process and methodology that meets the needs of the organisation
  - P2 Ensure that the succession planning process and methodology is integrated with other relevant HR processes
  - P3 Implement the succession planning process and methodology, ensuring that data from other sources is used appropriately
  - P4 Ensure that critical posts are identified
  - P5 Ensure that senior leaders and managers understand and fully engage with succession planning processes and activities
  - P6 Ensure that succession plan records are accurate and maintained
  - P7 Ensure that succession plan information is used when filling key positions
  - P8 Evaluate succession planning processes and methodologies and recommend relevant improvements

## Knowledge and understanding

*You need to know and understand:*

- K1 The organisation's strategy, performance goals and drivers
- K2 The sector in which the organisation operates and the market factors that impact on its performance
- K3 How human resource levers drive organisational performance
- K4 The reasons for and benefits of succession planning within the organisation
- K5 Succession planning processes and methodologies and how to develop these to meet organisational needs
- K6 Other HR processes that should be taken into account in succession planning and how to ensure that processes are integrated
- K7 How to ensure that data from other sources is used appropriately as part of succession planning
- K8 How to identify critical posts within the organisation
- K9 How to engage senior leaders and managers
- K10 The records that need to be maintained
- K11 How to ensure that succession plan information is used when key positions are filled
- K12 How to evaluate succession planning processes and methodologies

## CFAHR4

### Manage succession planning

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**Suite** Human Resources

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