



W O R K B O O K

A Practical Succession Planning Workshop
March 26, 2026 | 8am-12pm, CST
Facilitated by Tanya Zion





TIP OFF

WELCOME AND ORIENTATION

Name	Organization
Role / Title	One Leadership Risk on Your Mind Today

My #1 Leadership Risk Coming Into Today

What role would create the most disruption if vacant tomorrow? What keeps you up at night about your bench?



SETTING THE BRACKET

CLARIFY SCOPE & IDENTIFY CRITICAL ROLES

Scope Decision

What are we solving for?

Choose One: Risk Mitigation / Growth Readiness / Both

Scope: Entire Org / Division / Executive Team / High-impact roles only

The Role I'm Working With Today

Role Title:

Level: Executive / Manager / Individual Contributor

What breaks if this role is vacant tomorrow?

How many days before customers/members/board feel it?

Who steps in today – and are they actually ready?

GAME PLAN

DEFINE WHAT SUCCESS LOOKS LIKE

Use the Leadership Success Profiles in the separate document. Select the level that matches your role. Identify the 3–5 highest-priority items per quadrant for *THIS* role specifically — not every item will apply equally.

What I Do — Top Capabilities Required	What I've Done — Experience Required
Who I Am — Personal Attributes Required	What I Know — Knowledge Required
Non-Negotiables — What a Successor Cannot Step In Without	
<i>2–3 items only. What is truly disqualifying if missing?</i>	
2–5 Years Forward Look: What Will This Role Require That It Doesn't Today?	
<i>Strategy Shifts / Technology / Scale / Market Changes</i>	



SCOUTING THE BENCH

ASSESS CURRENT TALENT

Readiness Key:

RN = Ready Now | 1YR = Within 1 Year | 2+ = Within 2–5 Years | NV = Not Currently Viable

Name / Current Role	Performance (High/Med/Low)	Readiness (RN/1YR/2+/NV)	Risk of Loss (High/Med/Low)	Interest Confirmed?	Key Development Gap

Bench Strength Reality Check

What does this table tell you? Where are you exposed? Where do you have strength?



DRIVE TO THE PAINT

IDENTIFY GAPS

*Be specific. 'Needs to develop leadership skills' is not a gap — it's a label.
'Has not led a team through a reorganization' is a gap.*

Candidate 1 Name:

Specific Gap (be precise)	Talent Gap or Org Gap?	Why This Matters for Readiness

Candidate 2 Name:

Specific Gap (be precise)	Talent Gap or Org Gap?	Why This Matters for Readiness



BUILDING THE BENCH

DEVELOPMENT PLAN

Development Type:

A = Challenging Assignment
R = Developmental Relationship
T = Formal Training

Research Shows:

Weigh your plan accordingly.

- 70% of meaningful leadership development comes from assignments.
- 20% from relationships
- 10% from training

Candidate Name:

Current Readiness:

Specific Development Action	Type (A/R/T)	Timeline	Who's Accountable?	How We'll Measure Progress

Emergency Coverage Plan

If this role were vacant tomorrow – Who covers day 1–30? What's the first decision that can't wait? Who gets notified first?

Knowledge Transfer Audit – What Lives Only in This Person's Head?

Documentation Gaps / Relationship Risks / System Access / Institutional knowledge that exists nowhere else:



CALLING THE PLAYS NOTHING BUT NET

COMMUNICATE AND SUSTAIN

Next 30 Days	Next 60 Days	Next 90 Days
Two Things I'm Walking Out With Today		
One decision I will make:		
One conversation I will have:		

THE FRAMEWORK IS YOURS. NOW BUILD IT INTO YOUR ORGANIZATION.

Today gave you the process. Advisory gives you a structured path to apply it — across roles, across leadership levels, and in front of the people who need to support it.

YOUR ROLE

You lead the work internally. You own the framework, drive the conversations, and build something that fits your organization — its size, structure, and leadership philosophy.

OUR ROLE

An AAIM Leadership Consultant works alongside you — providing structure, tools, coaching, and guidance so you can move forward with clarity and fewer roadblocks.

WHAT THE ENGAGEMENT COVERS

- **Identify and prioritize critical roles.** Surface the positions that represent the greatest operational risk and build your succession planning around what matters most.
- **Scale the framework across your organization.** Move beyond one role — build a structure that works org-wide, accounting for flat hierarchies, expanded responsibilities, and leadership readiness.
- **Prepare for the leadership conversation.** If you're bringing this to the C-suite or senior team, we help you frame it, anticipate the questions, and walk in ready.
- **Connect succession to development.** Build the tools, templates, and development planning structure that turn succession planning into an ongoing practice — not a one-time exercise.

You own the work. What's worth the investment is having a guide and advisor who helps you get there — with confidence, with structure, and with fewer of the roadblocks that slow this work down inside organizations.

INVESTMENT | \$3,350

Includes 10 hours of advisory, coaching, working sessions held online and with flexibility to meet your organizations needs and timeline. Need more support? Work directly with your consultant to expand the scope that aligns with your goals.

Ready to take this back to your organization?

Talk with an AAIM advisor about what succession planning looks like at scale — and what support would actually move it forward.

**TALK TO YOUR
ADVISOR →**