SUCCESSION PLANNING MATURITY MODEL ORGANIZATIONAL REPORT

Report Prepared for:

Organization: ABC Corp

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Introduction

Organizations with robust succession plans share several characteristics, including deeper leadership pipelines, carefully planned approaches to future leadership needs, and fewer last-minute, high-risk leadership decisions. However, few organizations are in that position.

The Succession Maturity Plan provides a detailed, structured framework to assess your organization's current position, highlight strengths, identify gaps, and guide you through the steps to enhance your leadership succession strategy.

How to Use This Report

As you review your organizational results, focus on **patterns rather than single-level indicators** to identify how to enhance your organization's readiness for leadership continuity.

This assessment does not evaluate any individual's leadership talent, performance, or preparedness for leadership roles. It focuses on the **strengths, consistency, and maturity of your organization's succession system** to detect priorities, guide discussions, and support deliberate actions. Additionally, the model and report do not address all indicators of succession-planning success in your organization. After reviewing the report, use the worksheet at the end to analyze your results and identify next steps to continue building your succession-planning processes.

The Four Areas of Succession Planning Maturity

This model evaluates succession planning across four areas that impact an organization's strategic succession maturity. The model assesses multiple dimensions within each Area independently, resulting in a holistic maturity level that reflects the consistency, depth, and impact of its current practices. The four areas are as follows:

Process Maturity	Future Readiness	Talent Culture	Outcomes and Impact
This area assesses the clarity, consistency, and repeatability of your current succession planning processes.	This area evaluates how your organization prepares leaders for future, not just current, roles and business priorities.	This area examines the extent to which your organizational leader's behaviors and norms support succession planning and leader development.	This area assesses whether your organization's current succession planning delivers meaningful results, detailing industry benchmarks and the processes it currently follows.

Understanding the Maturity Levels

Based on your survey responses, each area and dimension of the model is assigned a maturity-level rating reflecting the effectiveness of your processes and their impact.

Level 1: Absent	Level 2: Reactive
An Absent rating indicates that succession planning in general — or the specific area or dimension being assessed — is largely informal or missing. Actions tend to be reactive, inconsistent, and dependent on urgent needs rather than established practices.	A Reactive rating suggests that some practices are emerging but remain at an elementary-stage, inconsistent, or applied unevenly across the organization. Efforts are still dependent on individuals rather than a repeatable system.
Level 3: Integrated	**Level 4: Strategic**
An integrated rating reflects a defined, repeatable succession-planning process that is consistently implemented. The critical elements are in place, and practices are being used to make succession decisions.	A Strategic rating shows that succession planning and its components are fully embedded into how the organization develops leadership capability and prepares for the future. The elements are systematic, forward-looking, and data-driven.

If you have any questions about the results, the action steps proposed, or how to implement them in your organization, please contact us:

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OVERALL SUCCESSION PLANNING MATURITY SUMMARY

This section describes the succession-planning characteristics of organizations at the same maturity level as your organization. It provides an overall evaluation of the succession planning program and may not describe every facet of your program or efforts.

Overall Maturity Level: Reactive

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Description

Organizations at this level usually have some succession-planning elements in place but apply them inconsistently, activating them only in response to near-term vacancies or emerging leadership concerns. Processes, definitions, and leadership behaviors vary across functions, leading to uneven execution. The talent pipeline shows pockets of strength, but overall depth and readiness are inconsistent. These organizations have identified successors for some critical roles but have frequently based that identification more on current performance than demonstrated readiness. Meanwhile, other roles remain exposed to the risk that the organization will be unable to fill them quickly. These organizations typically have uneven, difficult-to-track succession development processes. Leadership continuity is possible in specific roles, but remains fragile across the organization, leading to preventable gaps, delays, and reliance on last-minute solutions. Advancement from this stage typically requires greater consistency and discipline, including aligning leaders around shared criteria, expectations, and review rhythms so that succession planning becomes proactive rather than event-driven. Progress accelerates when these organizations evaluate development and readiness with more rigor and follow-through.

MATURITY MODEL AREA-LEVEL INSIGHTS

PROCESS MATURITY

This section examines the critical processes embedded in succession planning efforts. It assesses items such as whether leadership expectations and potential criteria are clearly defined, how accurately leaders identify and assess future talent, and how well governance, technology, and measurement practices support a consistent succession process.

Maturity Level: **Absent**

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Level Description

At this level, an organization typically has only informal, sporadic, or isolated succession planning processes. Leaders typically lack a shared understanding of what succession planning should accomplish, which roles it should cover, or how it connects to the organization's continuity or strategy. Such organizations have rarely defined critical roles or articulated, measured, or discussed leadership readiness. They typically rely on personal judgment, hierarchy, tenure, or immediate operational pressures rather than shared criteria or structured evaluations to inform talent decisions. They rarely have adequate, agreed-upon tools, templates, or data sources to support succession discussions. Their development actions are most often ad hoc, undocumented, and disconnected from future role requirements. As a result, their leadership gaps are primarily invisible and therefore unmanaged until a vacancy, performance failure, or unexpected departure forces action. Succession planning at this level depends almost entirely on individual leader awareness and intent rather than organizational systems. There is little governance, no consistent review cadence, and minimal visibility beyond the immediate team or function. The organization is frequently caught unprepared for leadership transitions, and succession outcomes are unpredictable.

Potential Risks and Improvement Opportunities

The organization is often forced into reactive external hiring or rushed internal moves, due to the lack of established succession planning processes. Improvement can begin by establishing a shared succession framework with clear ownership and governance decisions, explicitly defining what constitutes a critical role and leadership readiness, and introducing regular, structured succession discussions that make bench strength, development needs, and leadership risks across the organization visible.

MATURITY MODEL AREA INSIGHTS (continued)

FUTURE READINESS

This section evaluates your organization's readiness for future successions, including whether it has clearly defined future leadership requirements, anticipates changes in roles and capabilities, defines critical risks, and is building a diverse, resilient leadership pipeline to address future challenges.

Maturity Level: **Absent**

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Level Description

At this level, the organization's succession planning focuses almost entirely on filling immediate leader vacancies. They have failed to explicitly define or discuss future leadership needs or longer-term pipelines. These organizations typically assume that today's leaders and leadership skills will remain sufficient as the organization evolves. They assess leadership readiness on current performance rather than future demands, and do not intentionally align development efforts with anticipated changes.

Potential Risks and Improvement Opportunities

Organizations at this level typically have significant blind spots to future leadership needs. When strategy, scale, technology, or operating models shift, the leadership pipeline is often unprepared, forcing reactive hiring or accelerated promotions that increase the risks of failure and slow execution. Improvement can begin by identifying future leadership gaps, defining the leadership capabilities required for future conditions, and discussing leadership needs across a multi-year horizon rather than treating succession as a short-term replacement exercise.

MATURITY MODEL AREA INSIGHTS (continued)

TALENT CULTURE

This section assesses your organization's talent culture, including the extent to which your current leaders own and are held accountable for expectations, behaviors, and investment in talent development and succession outcomes.

Maturity Level: **Reactive**

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Level Description

Organizations at this level are beginning to establish a talent development culture. Some leaders actively support development, transparency, and internal movement, while others do not, resulting in inconsistent employee experiences. Progress occurs in pockets. High-potential talent may advance in some areas while stagnating or disengaging in others, and the organization does not consistently align internal movement with readiness needs or organizational priorities.

Potential Risks and Improvement Opportunities

While readiness improves in specific functions or teams, uneven leadership behaviors create fragmented pipeline strength and limit enterprise-wide capability building. High-potential employees may become frustrated by inconsistent expectations and opportunities, increasing the risk of disengagement or attrition. Improving at this level typically involves setting clearer organization-wide expectations for leader involvement in talent development, standardizing transition and development programs for key roles, and encouraging broader internal movement aligned with readiness gaps rather than personal preferences.

MATURITY MODEL AREA INSIGHTS (continued)

OUTCOMES AND IMPACT

This section focuses on the measurable results that your organization's succession planning can potentially deliver, including promotion rates, the accuracy of your leadership-preparedness assessments, transition timing and success, as well as your overall succession pipeline health.

Maturity Level: **Reactive**

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Level Description

At this level, succession planning produces some positive succession outcomes, but results are inconsistent. They fill some roles smoothly, creating successful internal promotions. However, other positions experience delays, missteps, or readiness gaps. Leadership transitions improve in some sections of the organization, but outcomes vary widely by role, leader, or function. Confidence in succession effectiveness is uneven, and leadership continuity cannot be relied upon across the entire organization.

Potential Risks and Improvement Opportunities

Leadership continuity supports execution and stability, but future shocks, such as rapid growth, transformation, or increased complexity, may still test the depth and readiness of the pipeline. Organizations can enhance their succession planning impact by increasing the length and diversity of successor pipelines, validating readiness predictions against transition outcomes, and preparing for future leadership demand surges rather than relying on historical patterns.

DIMENSION-LEVEL INSIGHTS

AREA #1: PROCESS MATURITY

Strategy & Workforce Alignment

Assesses how well succession planning aligns with long-term business strategy and how consistently workforce risks (such as retirements, turnover, and capability gaps) inform succession decisions.

Maturity Level: **Absent**

Level Description

Organizations at this level tend to plan succession independently of their organizational strategy and make talent decisions without considering future growth, restructuring, or workforce risks, which leads to repeated surprises when critical roles become vacant.

Improvement Actions

Organizations at this level should begin with a basic workforce risk scan for critical roles, using available HRIS data to identify retirement exposure, voluntary turnover risk, and single-incumbent roles. They can accelerate their succession planning by making it part of the agenda for annual organizational planning or budgeting meetings, ensuring they consider leadership continuity alongside financial and operational decisions.

Leadership Requirements

Evaluates the clarity and quality of leadership expectations, how critical roles are defined, and whether leadership potential is based on objective, future-focused criteria rather than job performance alone.

Maturity Level: **Reactive**

Level Description

At this level, the organization has defined and inconsistently applied leadership expectations and potential indicators. Promotions are more consistent, and leaders are generally better matched to role requirements. However, the organization may not have fully considered future demands.

Improvement Actions

Improvement requires building a clear leadership capability or competency model informed by senior leader input, analysis of high-performing leaders in critical roles, and anticipated future business challenges. Leadership potential indicators—such as learning agility, complexity handling, influence, and systems thinking—should be defined separately from performance. Testing the model against recent promotion successes and failures helps validate relevance and improve credibility.

Talent Assessment

Measures the level of rigor in evaluating leadership potential and readiness, including the use of assessments, leader calibration, and robust talent review processes.

Maturity Level: **Absent**

Level Description

Organizations at this level rely only on individual managers to determine leadership potential and readiness. However, their decisions are subjective and inconsistent, increasing the risk of bias, overconfidence, and poor promotion outcomes.

Improvement Actions

Improvement should begin by training leaders to evaluate leadership potential, including recognizing common rating errors, developing bias awareness, and distinguishing between performance and potential. Formal talent calibration sessions/Talent Reviews facilitated by HR can help the organization discover discrepancies and anchor decisions in data rather than anecdotes. Requiring observable behavioral evidence to support readiness ratings improves rigor and accountability.

Talent Development

Assesses whether the organization has built a robust development system to accelerate leader potential.

Maturity Level: **Reactive**

Level Description

At this level, the organization has some development plans for critical leaders, but they often lack focus and follow-through. Some critical leaders grow as expected, while others progress unevenly, and readiness timelines remain unpredictable.

Improvement Actions

These organizations can improve by mapping common readiness gaps to specific development actions such as stretch roles, enterprise projects, and complexity. Their developmental assignments should include clear success criteria and learning goals. Reviewing development progress during formal talent reviews reinforces accountability and follow-through.

Governance & Accountability

Assesses leadership ownership, follow-through, and how frequently and consistently succession discussions occur across levels of the organization.

Maturity Level: **Reactive**

Level Description

Organizations at this level have succession planning procedures, but it lacks consistent accountability. Leaders take some action, but follow-through depends heavily on individual leaders.

Improvement Actions

These organizations can improve by expanding succession planning beyond the executive level to include critical mid-level roles. Require leaders to track follow-through on development and placement action, as well as report progress on previously identified risks and actions.

Process Enablement

Reflects how well succession planning is supported by clear processes, systems, and metrics that make it easy for leaders to participate and provide insight into the effectiveness of succession decisions over time.

Maturity Level: **Absent**

Level Description

At this level, organizations have unclear, manual succession processes that are challenging to complete. They collect/document little to no succession data, and leaders have limited visibility into the effectiveness of succession planning.

Improvement Actions

Improvement should begin by documenting a simple, standard succession process that outlines who participates, when decisions are made, and the required leadership evaluations. Replacing ad hoc spreadsheets with a single consistent template or system improves reliability. Tracking core metrics, such as successor coverage and readiness levels, creates a data foundation.

AREA #2: FUTURE READINESS

Future Pipeline Strength

Measures how well the pipeline reflects the future of the business through diversity, succession risk mitigation, and readiness for emerging roles and challenges.

Maturity Level: **Absent**

Level Description

Organizations at this level typically have limited visibility into future leadership needs. Their succession planning primarily focuses on current vacancies. When leaders leave unexpectedly, they have no viable internal successors. They rarely have structured ways to examine longer-term exposure to retirements, retention risk, or short pipelines.

Improvement Actions

Organizations at this level can benefit from creating a simple future leadership risk register for critical roles with a three- to five-year horizon. This register should include roles at risk due to retirement, retention issues, and roles with only one potential successor. Leaders should be required to identify at least one potential successor for every role, even if the successor is not yet ready to assume it. This would increase risk transparency. Separating future succession risk tracking from current vacancy management helps shift thinking from replacement to preparation.

Future Capability Requirements

Evaluates how well future leadership skills, capabilities, and role requirements are defined, discussed, and incorporated into planning as the business evolves.

Maturity Level: **Reactive**

Level Description

Organizations at this level discuss emerging leadership capability needs sporadically but do not systematically address them. As a result, development remains anchored to current role requirements, slowing readiness for future challenges.

Improvement Actions

These organizations can enhance their succession planning by conducting structured future capability analyses that combine executive interviews on upcoming strategic challenges with external trend scanning across industry, technology, and regulation. They should translate these insights into clear leadership capability statements that describe what future leaders must be able to do differently. Then, they can align development plans with future role demands.

AREA #3: TALENT CULTURE

Talent Mindset

Evaluates whether leaders value internal talent, participate in developing successors, prioritize internal promotion, and provide transparent guidance to high-potentials.

Maturity Level: **Reactive**

Level Description

At this level, In organizations with reactive level succession planning, some leaders actively support development and transparency, while others do not, resulting in uneven employee experiences. Confidence in the succession process varies widely across leaders and functions, and perceptions of fairness and opportunity are inconsistent.

Improvement Actions

Improvement typically requires clear definitions of what it means to be "high-potential" and the communication of expectations for growth, readiness, and development. Normalizing senior leader involvement through formal mentoring or sponsorship expectations helps create more consistent signals about talent investment. Standardizing transition plans for leaders stepping into key roles improves confidence in the process and reinforces the organization's commitment to successful leadership transitions.

Talent Movement

Assesses whether the organization uses mobility—cross-functional moves, rotations, and talent sharing—to accelerate readiness and distribute talent equitably across the enterprise.

Maturity Level: **Absent**

Level Description

At this level, talent movement is limited, and leaders often hoard high-potential individuals within their teams for short-term needs rather than long-term development. Opportunities for cross-functional experience are rare, constraining growth and limiting readiness for broader leadership roles.

Improvement Actions

Improvement should include identifying and removing structural barriers to internal movement, such as informal manager vetoes or unclear responsibility for talent promotion decisions. Tracking internal moves and lateral development assignments creates transparent movement patterns. When movement is critical to development, HR or senior leadership intervention may be necessary to facilitate assignments that build readiness rather than reinforce silos.

AREA #4: OUTCOME AND IMPACT

Pipeline Health

Assesses whether critical roles have viable successors, how deep the pipeline is, and whether readiness ratings match post-promotion performance.

Maturity Level: **Absent**

Level Description

At this level, many critical roles lack ready or near-ready successors. Leadership risk is high and typically becomes visible only when vacancies occur, forcing reactive decisions.

Improvement Actions

Improvement can start by identifying critical roles with zero or single successors and formally flagging them as enterprise risks. Concentrate development efforts on a small number of high-risk roles rather than expanding succession scope prematurely.

Process Outcomes

Reflect the reliability, accuracy, and credibility of the succession planning process itself.

Maturity Level: **Reactive**

Level Description

At this level, potential evaluations are sometimes accurate, but results are inconsistent. Leaders question the reliability of readiness ratings.

Improvement Actions

Improvement opportunities involve regularly comparing predicted readiness to actual post-promotion performance and using the findings to refine readiness definitions. Strengthen calibration discipline to ensure ratings are anchored in consistent criteria rather than individual judgment.

Business Impact

Evaluates how succession planning outcomes impact the business's capabilities.

Maturity Level: **Reactive**

Level Description

Organizations at this level have some leadership disruption and leadership transitions create friction, delays, and uneven performance.

Improvement Actions

Improvement can be achieved by linking succession outcomes to operational metrics such as time-to-productivity and transition effectiveness. Focus improvement efforts on the roles where leadership gaps most directly affect execution or customer outcomes.

SUCCESSION PLANNING MATURITY: ACTION PLANNING WORKSHEET

This worksheet will help your HR department and Talent Management/OD team assess the maturity of your organization's succession planning to identify and prioritize actionable steps to strengthen your leadership pipeline. The goal is not to fix everything at once, but to focus on the highest-impact opportunities that will move your organization to the *next level of maturity*.

Area-Level Focus
Review your maturity level across the four areas below.

Area	Maturity Level	Dimensions in Area with Lowest Maturity
Process Maturity	_____	_____
Future Readiness	_____	_____
Talent Culture	_____	_____
Outcomes & Impact	_____	_____

Which dimensions represent the most significant opportunities for immediate improvement? (Consider business risks, upcoming retirements, growth plans, and leadership gaps.)

Dimension-Level Review
Review the improvement opportunities identified in the lowest-maturity dimensions of your report, and determine the specific actions you will take to strengthen and advance your succession planning system.

1. _____

2. _____

What would *meaningful improvement* look like at the next level?
(Focus on clarity, consistency, ownership, or integration rather than perfection.)

What is one realistic action we could take in the next 90 days to move forward?
(e.g., Policies, governance, tools, leader expectations, or process changes.)

APPENDIX: ITEMS IN THE SURVEY

Area	Dimension	QuestionText
Process Maturity	Strategy & Workforce Alignment	How well is succession planning aligned with your long-term business strategy?
Process Maturity	Strategy & Workforce Alignment	How consistently are workforce risks (e.g., turnover, retirements) used to inform succession decisions?
Process Maturity	Leadership Requirements	How are critical roles identified?
Process Maturity	Leadership Requirements	To what extent are leadership expectations clearly defined?
Process Maturity	Leadership Requirements	How is leadership potential defined?
Process Maturity	Talent Assessment	How are assessment tools integrated into the succession process?
Process Maturity	Talent Assessment	How are leaders trained to evaluate leadership potential accurately?
Process Maturity	Talent Assessment	How are talent reviews used to validate potential evaluations?
Process Maturity	Talent Assessment	How systematically are succession decisions reviewed for bias and fairness?
Process Maturity	Talent Development	How consistently do leaders hold meaningful career/development conversations with high-potential talent?
Process Maturity	Talent Development	To what extent do high-potential leaders have quality development plans?
Process Maturity	Talent Development	To what extent are stretch assignments/experiences used for development?
Process Maturity	Governance & Accountability	How often do succession/talent discussions occur?
Process Maturity	Governance & Accountability	How reliably do leaders follow through on development and succession commitments?
Process Maturity	Governance & Accountability	Which leadership levels have succession plans?
Process Maturity	Governance & Accountability	Ultimately, who owns Succession Planning in your organization?
Process Maturity	Process Enablement	How would your leaders rate the ease of completing the succession planning process?
Process Maturity	Process Enablement	How well do technology and analytics support succession planning activities?
Process Maturity	Process Enablement	To what extent are company bench strength trends monitored?
Process Maturity	Process Enablement	How do you measure the effectiveness of your succession planning process?
Future Readiness	Future Pipeline Strength	To what extent are future succession risks (individual or role) identified and mitigated?
Future Readiness	Future Pipeline Strength	How well is diversity (e.g., demographics, background, thinking styles) represented in the succession pipeline?

Future Readiness	Future Pipeline Strength	To what extent do your high-potential leaders reflect the capabilities needed for future business challenges?
Future Readiness	Future Capability Requirements	How much does succession planning take into consideration expected changes in business structure, scale, or strategic direction?
Future Readiness	Future Capability Requirements	How clearly are future leadership skills and capability needs defined?
Future Readiness	Future Capability Requirements	How often are future leadership needs discussed as part of business planning?
Talent Culture	Talent Mindset	How transparent is the succession planning process to employees—especially high-potential leaders?
Talent Culture	Talent Mindset	How actively do Senior Leaders participate in developing successors?
Talent Culture	Talent Mindset	To what extent are internal leaders prioritized when filling critical roles?
Talent Culture	Talent Mindset	What support do leaders receive when hired or promoted into new roles?
Talent Culture	Talent Movement	How intentionally are cross-functional moves used to build leadership readiness?
Talent Culture	Talent Movement	How effectively do leaders share and rotate talent across teams for development and business needs?
Outcomes and Impact	Pipeline Health	How frequently do promotions come from leaders on succession plans?
Outcomes and Impact	Pipeline Health	What percentage of critical roles with at least one Ready-Now successor?
Outcomes and Impact	Pipeline Health	What percentage of all leadership roles have zero successors listed on the plan?
Outcomes and Impact	Pipeline Health	What percentage of critical roles have 2+ successors identified?
Outcomes and Impact	Pipeline Health	What percentage of critical roles are currently filled with high-potential leaders?
Outcomes and Impact	Process Outcomes	What percentage of leaders on succession plans come from underrepresented groups?
Outcomes and Impact	Process Outcomes	What percentage of high-potentials have a formal, up-to-date development plan?
Outcomes and Impact	Process Outcomes	What percentage of leaders complete succession planning processes by due dates?
Outcomes and Impact	Process Outcomes	Overall, how accurate are leaders' evaluations of potential?
Outcomes and Impact	Process Outcomes	What percentage of leadership roles are filled internally?
Outcomes and Impact	Business Impact	What is the average number of days to fill critical leadership roles?
Outcomes and Impact	Business Impact	What percentage of promoted leaders rated as excelling after 12 months?
Outcomes and Impact	Business Impact	To what extent does leadership turnover disrupt business operations?