



QUINN
STRATEGY
GROUP



Transition Readiness Worksheet

To increase the probability of a smooth transition, our **Transition Readiness Worksheet** will help you assess where you stand in four key areas.



Directions

As you complete the worksheet, you'll be able to see where your succession gaps lie and what you need to do to prepare the organization, the leadership team, your board and key stakeholders. First, score where you are now on a scale of 1 to 5 (1 = Low, 5 = High). Then after scoring, go back and indicate which are top priorities.

PRIORITY*	RATING (1-5)	PREPARE ORGANIZATION
		The organization is positioned for long-term viability in the marketplace
		Our organizational strategy and priorities are well understood by managers
		We've developed systems and processes to reduce reliance on individuals
		Emergency succession plans are in place to address an untimely departure
PRIORITY*	RATING (1-5)	DEVELOP LEADERS
		We've identified the leadership capabilities that will drive our future success
		We have a clear picture of what each leader aspires to be in his or her career
		We know what key roles will be filled by current employees or recruited
		We've assessed and created development plans for each rising leader
PRIORITY*	RATING (1-5)	ENGAGE BOARD
		We have a full complement of board members, committees and talents
		Our board has a committee or designated group responsible for governance
		Our board has been involved in the creation of a strategic plan
		We have a budget and dedicate time annually for board development
PRIORITY*	RATING (1-5)	CULTIVATE STAKEHOLDERS
		Our leaders have a clear picture of all stakeholders who influence our mission
		We have discussed our internal expectations for each stakeholder / group
		We have developed engagement strategies for each stakeholder / group
		We are actively creating trust-based, transparent stakeholder relationships

The first step in knowing where to go is knowing where you are.
We can assist you on your journey.