

## Critical Role Identification Questionnaire

The Critical Role Identification Questionnaire is a critical position assessment tool that will help you to identify those key roles that your organisation should target in your succession program.

The questionnaire asks you to list all the roles in your company that are most important to operations. Be sure to consider both essential people and essential roles to target when creating your succession plan.

Once you have identified each of your critical roles, the next step in the succession planning process is to rate each role on the following five criteria. Use higher ratings to indicate areas of concern.

### Criteria for Critical Role Identification for Succession Planning

#### 1. Urgent Need to Fill the Position

Based on past conversations and eligibility to retire, indicate how soon you anticipate needing to fill the role. You can use the following values as a guideline:

- **1-2 = low urgency**, person likely to stay beyond the next 5 years
- **3 = moderate urgency**, person may leave the role in the next 3 to 5 years
- **4-5 = indicates high urgency**, person is likely to leave in less than 3 years

#### 2. Low External Candidate Availability

Rate how difficult you expect it would be to fill this critical role with an external candidate. Higher scores indicate greater difficulty in finding external hires.

#### 3. Poor Internal Bench Strength

Evaluate how long you think it would take for an internal succession candidate to become ready to fill this role. You can use the following values as a guideline to rate your succession bench strength:

- **1-2 = strong bench**, multiple candidates ready in 1-3 years
- **3 = moderate bench**, some candidates ready in 3-5 years
- **4-5 = weak bench**, few candidates that will not be ready for 5+ years

#### 4. Strong Impact on Business

Rate how immediately and severely your business would be affected if this critical role was made vacant today. Again, higher scores indicate a greater impact.

#### 5. Unique Skill Set or Knowledge Base

Consider if this role requires any specialised skills or knowledge. Evaluate not only the skills needed to be qualified for the role, but also the institutional knowledge that is needed to be successful in this role.

After completing your ratings, calculate a total for each role by adding scores across the five criteria. To prove the success of your process to key stakeholders we recommend starting with 1-5 critical roles. As you demonstrate the value that Succession Planning brings, you are likely to gain more support and the resources needed to roll out your plan across the organisation.

