1. **Identify Purpose/Goals/Objectives**: Identify specific goals for the succession planning effort. For example:
   a. *Purpose*: “strengthen the leadership pipeline by identifying and developing a pool of diverse candidates who will compare favorably to external candidates in a national search for college and university presidents.”
   b. *Measurable Objective*: “hire 50% of new presidents from within the Minnesota State Colleges and Universities”; “increase diversity of internal candidates who are ready to apply for presidential positions”

2. **Define Competencies**: (knowledge, skills, abilities, and personal characteristics) that are essential for the role(s) targeted for the succession planning effort. Competencies can be functional (technical expertise) or leadership-based. MnSCU leadership competencies can be found at: [http://www.hr.mnscu.edu/training_and_development/leadership_developme.html](http://www.hr.mnscu.edu/training_and_development/leadership_developme.html)
3. **Assess Employee Performance/Potential**: Often referred to as a “talent review,” this is where managers review employee performance through a number of data sources, such as annual performance review data, individual development plans, and other assessments that can uncover potential, such as learning agility, adaptability, etc.

4. **Identify Candidates**: for succession planning effort, based upon the results of the talent review.

5. **Accelerate Development**: based upon a gap assessment for each candidate, work with the succession candidates to create individual development plans that address the gaps they have in knowledge, skills, or experience. Individual development plans can include mentoring, coaching, intentional networking, formal development programs, higher education courses or degree completion, stretch assignments, mobility assignments, and institution or system service opportunities.

6. **Build Support System**: work to create good communication systems and processes for the succession planning effort. Support systems may include assistance with identifying the purpose/goals/objectives for a succession planning effort, tools and templates for candidate identification, guides for accelerating development, etc.

7. **Evaluate Succession Program**: based upon the measurable goals and objectives that are set for the succession planning effort, evaluate results and refine the program as needed.