

# Skills and abilities valued in the successor tool

The **Skills and abilities valued in the successor** tool is a reflection guide to help you identify the qualities you are seeking in your successor(s).

## The purposes of this tool are to help you to:

- recognize the qualities and skills you're seeking in your successor(s);
- identify your successors' training needs;
- clarify your vision of your successors' leadership skills;
- identify the leadership qualities you are seeking.

## Instructions:

1. Step 1: Checkmark the items that best correspond to the qualities you **value** in your successor(s).
2. Step 2: Checkmark the items that best correspond to the qualities you **would like** your successor(s) to develop.
3. Step 3: Based on the information in the preceding tables, openly discuss your perceptions with your successors: ask for their point of view and, using the table, write down the skills your successors will have to **acquire** before assuming their future roles in the business.

## Skills and abilities valued in the successor

### STEP 1: QUALITIES VALUED

Checkmark the items that best correspond to the qualities you **value** in your successor(s).

<p><b>PERSONAL QUALITIES AND SKILLS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Experience</li> <li><input type="checkbox"/> Education</li> <li><input type="checkbox"/> Self-confidence</li> <li><input type="checkbox"/> Maturity</li> <li><input type="checkbox"/> Integrity</li> <li><input type="checkbox"/> Tenacity</li> <li><input type="checkbox"/> Loyalty</li> <li><input type="checkbox"/> Honesty</li> </ul>	<p><b>MANAGEMENT SKILLS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Decision-making skills</li> <li><input type="checkbox"/> Risk management</li> <li><input type="checkbox"/> Stress management</li> <li><input type="checkbox"/> Delegation skills</li> <li><input type="checkbox"/> Unifier</li> <li><input type="checkbox"/> Planning and organization</li> <li><input type="checkbox"/> Advisor</li> <li><input type="checkbox"/> Fairness</li> </ul>
<p><b>KNOWLEDGE OF THE BUSINESS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Experience in the business</li> <li><input type="checkbox"/> Commitment to the business</li> <li><input type="checkbox"/> Vision of the future of the business</li> </ul>	<p><b>EMPLOYEE LEADERSHIP</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Employees have a high opinion of the successor(s)</li> <li><input type="checkbox"/> Employees listen to the successor(s)</li> <li><input type="checkbox"/> Employees have respect for the successor(s)</li> </ul>
<p><b>COMMUNITY SPIRIT</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I've noted that the successor is concerned with the welfare of employees and community members.</li> <li><input type="checkbox"/> I've noted that the successor(s) want(s) to contribute to the economic development of the region.</li> </ul>	<p><b>LEADERSHIP AMONG FAMILY MEMBERS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The family members have a high opinion of the successor(s).</li> <li><input type="checkbox"/> The family members listen to the successor(s).</li> <li><input type="checkbox"/> The family members have respect for the successor(s).</li> </ul>

## Skills and abilities valued in the successor

<b>TECHNICAL SKILLS</b>	<b>ADMINISTRATIVE SKILLS</b>
<p>E.g. milking techniques, insemination techniques, use of various software, equipment maintenance</p> <p><input type="checkbox"/> Excellent</p> <p><input type="checkbox"/> Good</p> <p><input type="checkbox"/> Average</p> <p><input type="checkbox"/> Poor</p>	<p>E.g. interpretation of financial statements, control of expenses, assessment of production costs, construction project management</p> <p><input type="checkbox"/> Excellent</p> <p><input type="checkbox"/> Good</p> <p><input type="checkbox"/> Average</p> <p><input type="checkbox"/> Poor</p>
<b>TRANSVERSAL SKILLS</b>	<b>EMOTIONAL INTELLIGENCE</b>
<p>E.g. heading up a working group, excelling at problem-solving and conflict resolution, etc.</p> <p><input type="checkbox"/> Excellent</p> <p><input type="checkbox"/> Good</p> <p><input type="checkbox"/> Average</p> <p><input type="checkbox"/> Poor</p>	<p>E.g. controlling his emotions, respecting colleagues, managing stress, exercising self-control, etc.</p> <p><input type="checkbox"/> Excellent</p> <p><input type="checkbox"/> Good</p> <p><input type="checkbox"/> Average</p> <p><input type="checkbox"/> Poor</p>

## Skills and abilities valued in the successor

### STEP 2: DESIRED QUALITIES

Checkmark the items that best correspond to the qualities you **seek** in your successor(s).

<p><b>PERSONAL QUALITIES AND SKILLS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Experience</li> <li><input type="checkbox"/> Education</li> <li><input type="checkbox"/> Self-confidence</li> <li><input type="checkbox"/> Maturity</li> <li><input type="checkbox"/> Integrity</li> <li><input type="checkbox"/> Tenacity</li> <li><input type="checkbox"/> Loyalty</li> <li><input type="checkbox"/> Honesty</li> </ul>	<p><b>MANAGEMENT SKILLS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Decision-making skills</li> <li><input type="checkbox"/> Risk management</li> <li><input type="checkbox"/> Stress management</li> <li><input type="checkbox"/> Delegation skills</li> <li><input type="checkbox"/> Unifier</li> <li><input type="checkbox"/> Planning and organization</li> <li><input type="checkbox"/> Advisor</li> <li><input type="checkbox"/> Fairness</li> </ul>
<p><b>KNOWLEDGE OF THE BUSINESS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Experience in the business</li> <li><input type="checkbox"/> Commitment to the business</li> <li><input type="checkbox"/> Vision of the future of the business</li> </ul>	<p><b>EMPLOYEE LEADERSHIP</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Employees have a high opinion of the successor(s)</li> <li><input type="checkbox"/> Employees listen to the successor(s)</li> <li><input type="checkbox"/> Employees have respect for the successor(s)</li> </ul>
<p><b>COMMUNITY SPIRIT</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> I've noted that the successor is concerned with the welfare of employees and community members.</li> <li><input type="checkbox"/> I've noted that the successor(s) want(s) to contribute to the economic development of the region.</li> </ul>	<p><b>LEADERSHIP AMONG FAMILY MEMBERS</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> The family members have a high opinion of the successor(s).</li> <li><input type="checkbox"/> The family members listen to the successor(s).</li> <li><input type="checkbox"/> The family members have respect for the successor(s).</li> </ul>

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<b>TRANSVERSAL SKILLS</b>	<b>EMOTIONAL INTELLIGENCE</b>
<p>E.g. heading up a working group, excelling at problem-solving and conflict resolution, etc.</p> <p><input type="checkbox"/> Excellent</p> <p><input type="checkbox"/> Good</p> <p><input type="checkbox"/> Average</p> <p><input type="checkbox"/> Poor</p>	<p>E.g. controlling his emotions, respecting colleagues, managing stress, exercising self-control, etc.</p> <p><input type="checkbox"/> Excellent</p> <p><input type="checkbox"/> Good</p> <p><input type="checkbox"/> Average</p> <p><input type="checkbox"/> Poor</p>

# Skills and abilities valued in the successor

## STEP 3: SKILLS TO BE ACQUIRED

Write down the skills that your successor(s) will have to **acquire** in order to assume the role they will play in the business.

LIST OF SKILLS TO ACQUIRE	SCHEDULE FOR ACQUIRING SKILLS
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____
_____	Month _____ Year _____

**Note:** Contact a training advisor to help you create a successor development plan.