

# Key successor skills and abilities tool

The **Key successor skills and abilities** tool is a reflection guide to help you identify the qualities that you have or the ones you need to acquire.

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

- recognize the qualities and skills that you possess;
- identify your training needs;
- clarify your vision of leadership;
- identify the leadership qualities that you possess.

## Instructions:

1. Step 1: Checkmark the items that best correspond to the qualities you **value** and possess.
2. Step 2: Checkmark the items that best correspond to the qualities you **would like** to develop.
3. Based on the information in the preceding tables, write down the skills you will have to **acquire** before assuming the management of the business.

## Key successor skills and abilities

### ÉTAPE 1 : QUALITIES VALUED

Checkmark the items that best correspond to the qualities you **value** and possess.

<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"/> Perseverance</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</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"/> Support and advice</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 am concerned with the welfare of employees and community members.</li> <li><input type="checkbox"/> I want 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>

## Key successor skills and abilities

<b>TECHNICAL SKILLS</b>	<b>ADMINISTRATIVE SKILLS</b>
<p>E.g. ability to draw up estimates and plans, use of various software, technical knowledge of a product, etc.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Excellent</li> <li><input type="checkbox"/> Good</li> <li><input type="checkbox"/> Fair</li> <li><input type="checkbox"/> Poor</li> </ul>	<p>E.g. interpretation of financial statements, setting of costs, assessment of losses, control of expenses, etc.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Excellent</li> <li><input type="checkbox"/> Good</li> <li><input type="checkbox"/> Fair</li> <li><input type="checkbox"/> Poor</li> </ul>
<b>GENERAL SKILLS</b>	<b>EMOTIONAL INTELLIGENCE</b>
<p>E.g. ability to lead work groups, ability to solve problems, ability to resolve conflicts, etc.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Excellent</li> <li><input type="checkbox"/> Good</li> <li><input type="checkbox"/> Fair</li> <li><input type="checkbox"/> Poor</li> </ul>	<p>E.g. controls his emotions, is respectful toward colleagues, manages stress, demonstrates self-control.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Excellent</li> <li><input type="checkbox"/> Good</li> <li><input type="checkbox"/> Fair</li> <li><input type="checkbox"/> Poor</li> </ul>

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### ÉTAPE 2 : DESIRED QUALITIES

Checkmark the items that best correspond to the qualities you **would like** to develop.

<b>PERSONAL QUALITIES AND SKILLS</b>	<b>MANAGEMENT SKILLS</b>
<input type="checkbox"/> Experience <input type="checkbox"/> Education <input type="checkbox"/> Self-confidence <input type="checkbox"/> Maturity <input type="checkbox"/> Integrity <input type="checkbox"/> Perseverance <input type="checkbox"/> Loyalty <input type="checkbox"/> Honesty	<input type="checkbox"/> Decision-making <input type="checkbox"/> Risk management <input type="checkbox"/> Stress management <input type="checkbox"/> Delegation skills <input type="checkbox"/> Unifier <input type="checkbox"/> Planning and organization <input type="checkbox"/> Support and advice <input type="checkbox"/> Fairness
<b>KNOWLEDGE OF THE BUSINESS</b>	<b>EMPLOYEE LEADERSHIP</b>
<input type="checkbox"/> Experience in the business <input type="checkbox"/> Commitment to the business <input type="checkbox"/> Vision of the future of the business	<input type="checkbox"/> Employees have a high opinion of the successor(s) <input type="checkbox"/> Employees listen to the successor(s) <input type="checkbox"/> Employees have respect for the successor(s)
<b>COMMUNITY SPIRIT</b>	<b>LEADERSHIP AMONG FAMILY MEMBERS</b>
<input type="checkbox"/> I am concerned with the welfare of employees and community members. <input type="checkbox"/> I want to contribute to the economic development of the region.	<input type="checkbox"/> The family members have a high opinion of the successor(s). <input type="checkbox"/> The family members listen to the successor(s). <input type="checkbox"/> The family members have respect for the successor(s).

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<b>GENERAL SKILLS</b>	<b>EMOTIONAL INTELLIGENCE</b>
<p>E.g. ability to lead work groups, ability to solve problems, ability to resolve conflicts, etc.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Excellent</li> <li><input type="checkbox"/> Good</li> <li><input type="checkbox"/> Fair</li> <li><input type="checkbox"/> Poor</li> </ul>	<p>E.g. controls his emotions, is respectful toward colleagues, manages stress, demonstrates self-control.</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Excellent</li> <li><input type="checkbox"/> Good</li> <li><input type="checkbox"/> Fair</li> <li><input type="checkbox"/> Poor</li> </ul>

# Key successor skills and abilities

## ÉTAPE 3 : SKILLS TO BE ACQUIRED

Write down the skills that you will have to **acquire** in order to assume the management role you will play in the business

LIST OF SKILLS TO BE 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 your skills development plan.