

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.

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STEP 1: QUALITIES VALUED

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

PERSONAL QUALITIES AND SKILLS	MANAGEMENT SKILLS
<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
KNOWLEDGE OF THE BUSINESS	EMPLOYEE LEADERSHIP
<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 <input type="checkbox"/> Employees listen to the successor <input type="checkbox"/> Employees have respect for the successor
COMMUNITY SPIRIT	LEADERSHIP AMONG FAMILY MEMBERS
<input type="checkbox"/> I've noted that the successor is concerned with the welfare of employees and community members <input type="checkbox"/> I've noted that the successor(s) want(s) 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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TECHNICAL SKILLS	ADMINISTRATIVE SKILLS
<p>E.g. preparing cost estimates, creating plans, using various software, possessing technical knowledge of a product, etc.</p> <p><input type="checkbox"/> Excellent</p> <p><input type="checkbox"/> Good</p> <p><input type="checkbox"/> Fair</p> <p><input type="checkbox"/> Poor</p>	<p>E.g. interpreting financial statements, setting prices, assessing losses, controlling expenses, etc.</p> <p><input type="checkbox"/> Excellent</p> <p><input type="checkbox"/> Good</p> <p><input type="checkbox"/> Fair</p> <p><input type="checkbox"/> Poor</p>
TRANSVERSAL SKILLS	EMOTIONAL INTELLIGENCE
<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"/> Fair</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"/> Fair</p> <p><input type="checkbox"/> Poor</p>

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STEP 2: DESIRED QUALITIES

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

<p>PERSONAL QUALITIES AND SKILLS</p> <ul style="list-style-type: none"> <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 	<p>MANAGEMENT SKILLS</p> <ul style="list-style-type: none"> <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
<p>KNOWLEDGE OF THE BUSINESS</p> <ul style="list-style-type: none"> <input type="checkbox"/> Experience in the business <input type="checkbox"/> Commitment to the business <input type="checkbox"/> Vision of the future of the business 	<p>EMPLOYEE LEADERSHIP</p> <ul style="list-style-type: none"> <input type="checkbox"/> Employees have a high opinion of the successor <input type="checkbox"/> Employees listen to the successor <input type="checkbox"/> Employees have respect for the successor
<p>COMMUNITY SPIRIT</p> <ul style="list-style-type: none"> <input type="checkbox"/> I've noted that the successor is concerned with the welfare of employees and community members <input type="checkbox"/> I've noted that the successor(s) want(s) to contribute to the economic development of the region 	<p>LEADERSHIP AMONG FAMILY MEMBERS</p> <ul style="list-style-type: none"> <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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STEP 3: SKILLS TO BE ACQUIRED

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

LIST OF SKILLS TO BE ACQUIRED	SKILLS DEVELOPMENT SCHEDULE
_____	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.