



## Succession Planning and Development Scope of Work Proposal (Simple Example)

**Client:** 009 Corporation

**Point of Contact:** Mr. Smart, CEO and owner

**Date:** May 19, 2013

**Project:** Succession Planning and Development

**Approximate Begin Date:** TBD

**Approximate Completion Date:** TBD

On May 14, 2013, Creative Consultant completed the Strategic Planning Process with the senior management team of 009 Corporation. During this process, the team identified 4 key goals for achieving the organizational growth desired by the owner and in-line with his eventual exit strategy.

In addition, the team identified the key competencies that will be required by management to ensure that the organization can fulfill these aggressive goals. The purpose of this Scope of Work is to detail the next step, Succession Planning and Development, which will ensure that the identified successor, Mr. Smart's daughter, Agent 99, is well prepared for her future role and the management team is well prepared to support her in this role.

### **Objective**

To develop a succession plan to prepare the next generation of leadership to lead the company in its quest to fulfill its strategic potential.

### **Impact**

Upon the implementation of the resulting plan, the company will have a well-prepared successor, a senior management team that is in agreement with the process and able to lend their full support to their new CEO and a family that is confident in their succession decision.

### **Methodology**

Mr. Creative Consultant will begin the process by inviting all of the senior management team members, including Mr. Smart and Agent 99, to complete the Profile XT - a tool designed specifically to identify job-specific competencies and potential gaps. Once this has been completed, Mr. Consultant will work with the team to identify how they can use their combined strengths to support the strategic plan and to identify the gaps that may present barriers to achieving the strategic plan.

Using this information, and in consultation with Agent 99, Mr. Consultant will develop a suggested plan of action. This may include identifying new positions that should be developed to accomplish key goals and crafting a personal leadership development plan for Agent 99 that will allow her to evolve the skills and knowledge necessary to be the future CEO of the organization.



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Purpose/Outcome	Actions	Cost
Competencies of Senior Leaders identified and leveraged to reach strategic goals.	Leaders invited to complete the Profile XT. Meeting to review the results – both individually and as a team. During team meeting, tactics developed to leverage skills against the strategic plan.	\$2800 – includes Profile XT, follow-up and individual meetings with 6 participants.
Competency gaps identified and action plan developed to fill those specific gaps.	Meeting with the management team to discuss gaps and how to fill these – with existing team members or the addition of new team members. Approximately 1 three-hour meeting	\$600
Leadership/Succession Plan developed for Agent 99 to ensure she can demonstrate and practice the necessary skills to run the Company in the future.	Review of personal Profile XT against strategic competencies. Identification of desired strengths in addition to those necessary for strategic development. Development of draft plan for review by Mr. Smart and Agent 99 and subsequently by the senior leadership team. Identification of local resources to support the plan and provide coaching.	\$2400 Includes all correspondence, facilitation, meeting preparation, post-meeting notes and follow-up.
Transition program developed with new roles and responsibilities for Mr. Smart and Agent 99 as the company works toward the transition.	Meeting with Mr. Smart and Agent 99 to discuss current roles and responsibilities and develop first draft for review with the management team.  Meeting with the management team to craft the transitional role and develop additional role clarification with other senior leaders as necessary.  Approximately 4 to 6 two-hour meetings over a 2-year period.	\$2600. Includes all correspondence, facilitation, meeting preparation, post-meeting notes and follow-up.
Method for discussing, reviewing and acting on personal accountability developed to ensure the company can meet its strategic goals.	Development of performance objectives for each senior management position – in discussion with individuals and as a group. Development of a draft document with agreed performance objectives related to the strategic plan. Development of an agreed meeting protocol for holding each other accountable. Facilitation of a team discussion and agreement on how to cascade accountability down through the organization. Approximately 4 to 6 two-hour meetings over a 2-year period.	\$2600. Includes all correspondence, facilitation, meeting preparation, post-meeting notes and follow-up.
<b>Total</b>		<b>\$11,000</b>

**Guarantee:** If not satisfied with the material or methods presented, the Client may cancel at any time and not be liable for any remaining services on this proposal.

**Note:** Client will be responsible for the cost of travel and accommodation as required; however, all effort will be made to enable cost sharing with other local clients (i.e. multiple appointments per trip).