



Insperity® OrgPlus® RealTime
User Guide
Succession Planning

Succession Planning

This guide will provide a brief explanation of the key features you will utilize when working with the succession planning module. The topics covered will include:

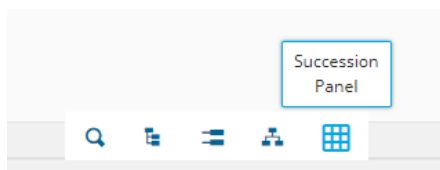
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Succession Planning Overview

The Insperity® OrgPlus® RealTime succession planning add-on helps companies identify the organization's key roles and determine high-potential employees who can fill those roles in the event of a vacancy of that role. Succession planning allows up to 10 internal or external candidates to add to each key position and a succession plan can be shared with other qualified users.

Accessing Succession Planning

To access succession planning, use the **Succession Panel** icon on the Secondary Workspace menu bar at bottom of your workspace. Only those who have permissions to use succession planning with have this icon on the menu bar.



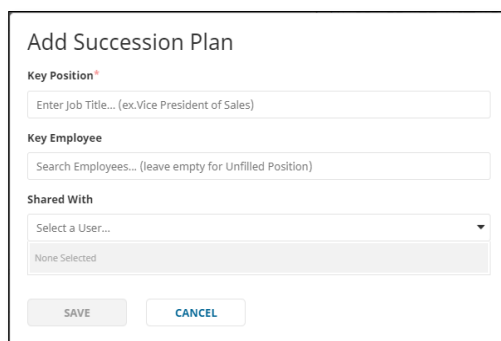
Adding a Succession Plan

To add a succession plan, click the **plus** button on the top right panel menu.



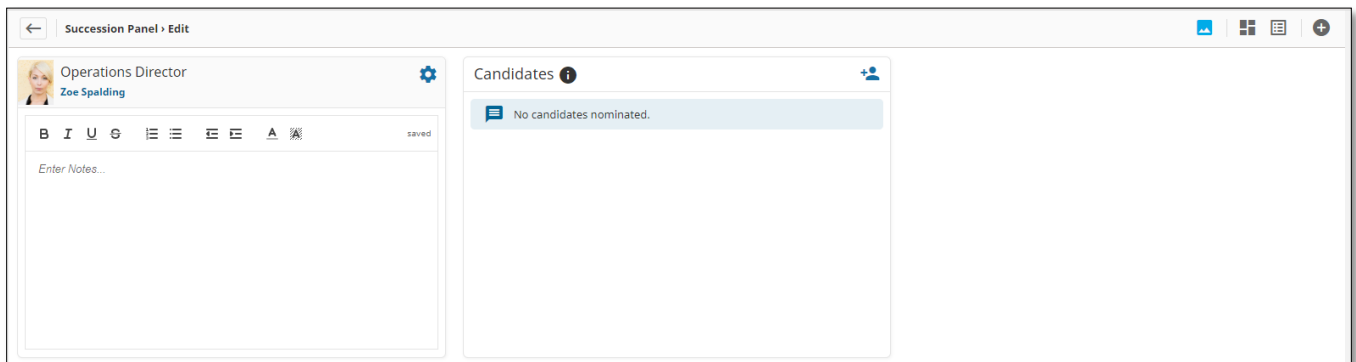
A window will display to enter the **Key Position** and the **Key Employee** for the role. If the role is unfilled, you can leave the **Key Employee** blank. If you would like to share the succession plan with another user in the system, select the user name* in the **Shared With** drop-down box.

* Only users with the succession planning permissions will be available in the drop-down list.

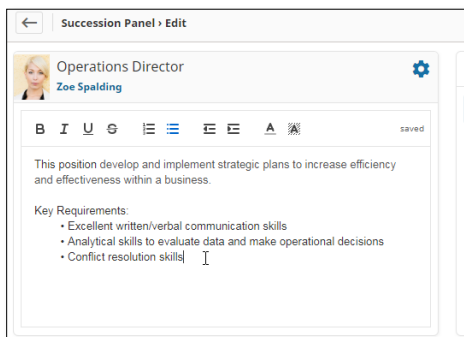
A screenshot of a dialog box titled "Add Succession Plan". It contains three input fields: "Key Position" with a placeholder "Enter Job Title... (ex.Vice President of Sales)", "Key Employee" with a placeholder "Search Employees... (leave empty for Unfilled Position)", and "Shared With" with a dropdown menu showing "Select a User..." and "None Selected". At the bottom, there are "SAVE" and "CANCEL" buttons.

Click **Save**.

You have now created a succession plan for that position and your plan can be managed in the **Succession Plan** panel.

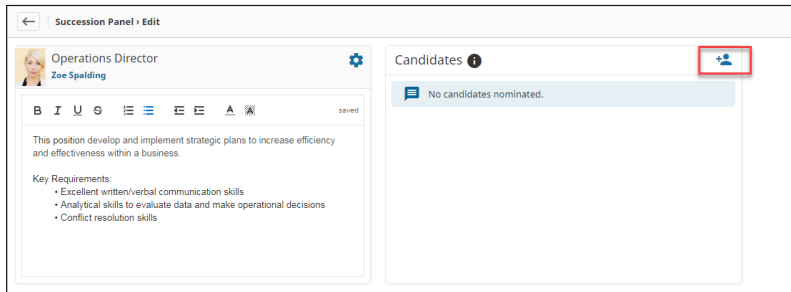


You have the option to fill in notes about the position in the notes section.

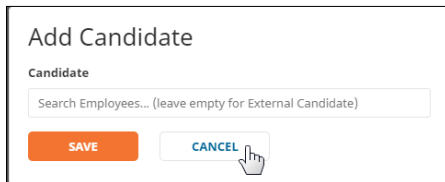


Adding Candidates

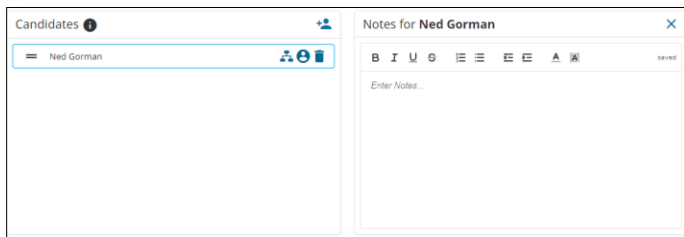
You can add candidates that have been identified to fill this role within the company or add external candidates. To add a candidate to the succession plan, click the **add icon** under the candidates area.



Search for an employee that exists within your organization chart or leave blank if the candidate is an external candidate.



Click on the candidate to add notes to the candidate's information.



To view the internal candidate in the organizational chart, click the **chart** icon:



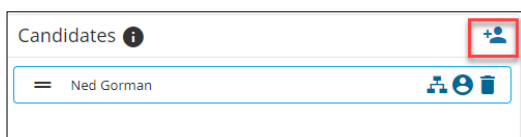
To view the internal candidate's profile card, click the **profile card** icon:



To delete the candidate from the candidate list, click the **garbage can** icon:













You can continue adding candidates by clicking the **add** icon in the candidate area. The maximum number of candidates for each succession plan is 10 candidates.



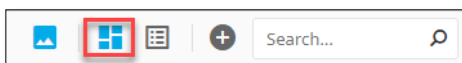
Viewing your Succession Plans


You can view your succession plans in either a list view or a card view. To view your plans and plans that have been shared with you in a list view, choose the **list view** icon.



Succession Panel					Search...
Key Employee	Key Position	Candidate Count	Owner	Last Updated	
 Glenn Spencer	Sales Director	1	stacey.skiba@neworgplus.com	a few seconds ago	   
 Zoe Spalding	Operations Director	1	stacey.skiba@neworgplus.com	5 minutes ago	   

To view your succession plan in a card view, choose the **card view** icon.




Succession Panel		Search...
 <p>Operations Director Zoe Spalding</p> <p>   Edited a few seconds ago</p>	 <p>Sales Director Glenn Spencer</p> <p>   Edited a minute ago</p>	


You are able to turn on and off the photos in either your list view or your card view by selecting the **photos** icon.



Managing your Succession Plans

To edit your succession plan, select the **edit** icon: 

To edit the properties of your succession plan (key employee, position, or shared with), select the **properties** icon: 

To delete the succession plan, select the **delete** icon: 

If a succession plan was shared with you, then you will not be able to change the properties or delete the succession plan. You would still be able to edit the succession plan to add candidates and notes.

Succession Planning FAQ's

How do I add a succession plan for a position that does not exist in my chart?

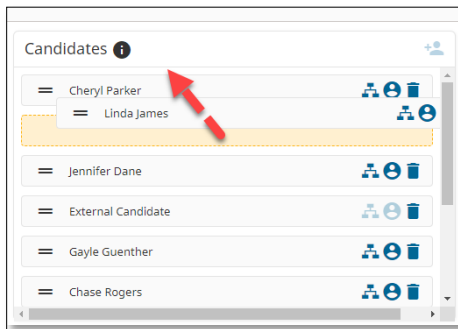
You can type the title of the position directly into the **Key Position** field in the succession plan properties.

How many candidates can I add to my candidate list for a position?

You can add up to 10 candidates per succession plan.

I would like to see the candidates for a position in a different order. How do I do this?

You can click, drag, and then drop the candidates in any order you choose.



Who can see/edit the succession plans I have created?

All full administrations can see and edit all plans that have been created. Role based users can only see the plans that they have created and plans that have been shared with them by other users. Shared users cannot change the properties of any plans shared with them, but they can edit them (add notes, add/remove candidates, etc.).

How can I share my succession plan with another user?

To share your plans with another user, click on plan properties and add the user. Please note, only those users who have succession planning permissions will be able to be added as a shared user to a succession plan.

When sharing a succession plan with another user, the application sends an email to that user notifying them of the shared plan.

Is there a way to tell who I have share my plan with?

When you hover over the share icon, a box will appear with all the users that have access to the succession plan.

Succession Panel				
Key Employee	Key Position	Candidate Count	Owner	Last Updated
	Sales Director	1	stacey.skiba@neworleans.com	Shared with Stacey Demo seconds ago
	Operations Director	1	stacey.skiba@neworleans.com	5 minutes ago