



# Succession

Process: Create a succession plan

Action done by: HR Talent Administrator, HR Admin, HR Partner

Visibility: HR Talent Administrator, HR Admin, HR Partner

# Overview:

After gathering the relevant information from leadership via conversation, you as the talent administrator, are ready to input a succession plan into the system. Remember this is succession planning for a position, not a person.

# Navigate to Tasks and Reports

The screenshot shows a web browser window with two tabs: 'Search Results - Saved Categories' and 'EPO3948 TRI Replace UKG Softw'. The address bar shows the URL: 'wd5-impl.workday.com/rhsc2/d/search.html?q=create+succession&state=searchCategory-all%3Adefault'. The page header includes a green bar with 'Implementation - rhsc2', a 'MENU' button, the Workday logo, and a search bar containing 'create succession'. A left sidebar shows 'Saved Categories' with 'People' (0) and 'Tasks and Reports' (1). The main content area is titled 'Tasks and Reports' and displays a 'Create Succession Plan' link and a 'Task' label.

Type in the name of the current incumbent – verify the position name



- Type Employee Name and fill out the rest of the form— select external candidate checkbox if needed. Also, external candidates can be pulled in from recruiting “prospects”

## Manage Succession Plan

Manager - Molly Manager



Consider External Candidate

2 items

	Order	Candidate	Strategy	*Readiness	Top Candidate	Temporary Fill	Notes	Time on Plan	Other Succession Plans	Last Promotion Date
		<input type="text" value="Ethan Employee As Self"/>	Promotion	Ready Now	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
		<input type="text" value="Candidate Smith"/>	External Candidate	1-2 Years	<input type="checkbox"/>	<input type="checkbox"/>				

Find Workers

Submit

Save for Later

Cancel



# Process: Run find succession plans report

## Role inputting into WD: HR Talent Administrator

### Visibility: HR Admin, HR Talent Admin, HR Partner

This screenshot shows a web browser window with the URL `wd5-impl.workday.com/rhsc2/d/search.html?q=succession&state=searchCategory-Tasks%20and%20Reports`. The page header includes a search bar with the text "succession" and a "MENU" button. A sidebar on the left shows "Saved Categories" with a sub-item "People" and a notification badge with the number "1". The main content area displays "Report" and a link for "Find Succession Plans".

This screenshot shows the configuration page for the "Find Succession Plans" report. It features a search bar with the text "search" and a "Saved Searches" link. Below the search bar, there are two filter sections: "Current Search" with "Save" and "Clear All" buttons, and "Organization" with a dropdown arrow. To the right, there are two filter items: "8 Results" and "Employee As Self (Unfilled)" with a sub-item "Allight Test Organization Level 2 (Molly Manager) | In Use | Active".






# View Succession Plan Employee As Self (Unfilled) ⋮

Last Updated 09/14/2023

Consider External Candidate

Table View

8 items

		 <b>Arthur Absence Partner</b> Provider Services Specialist I   RLHICA - Indianapolis
<b>Tenure</b>		
Current Job History		Absence Partner
<b>Succession</b>		
Succession Strategy		Promotion
Readiness		Ready Now
Top Candidate		Yes
Temporary Fill		
View Feedback		

Find Workers

Succession Plan History