



## Career Interest Questionnaire for Succession Planning

*Succession planning is becoming increasingly important as the baby-boomer generation begins to retire. With proper planning, you can groom a group of employees to fill any number of positions. This job aid is a career interest form. Fill out this form with employees. Then determine which employees are most qualified to take on higher positions. Help the employees gain any needed skills or extra experience to make their future transition as painless as possible.*

EmployeeName/Title \_\_\_\_\_  
Social Security Number \_\_\_\_\_  
Manager Name/Title \_\_\_\_\_  
Company/Sector \_\_\_\_\_  
Department/Branch \_\_\_\_\_  
Location \_\_\_\_\_

### 1. Company Experience (most recent jobs first)

From _____ to _____	From _____ to _____
Title _____	Title _____
Department/Branch _____	Department/Branch _____

### 2. Product Experience

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### 3. Additional Experience (relevant experience only)

From _____ to _____	From _____ to _____
Title _____	Title _____
Organization _____	Organization _____

### 4. Education—Formal Education/Degree

Year \_\_\_\_\_ Degree \_\_\_\_\_  
Institution \_\_\_\_\_  
Major or Specialization \_\_\_\_\_  
Certification/Licenses/Memberships \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
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**5. Other In-Depth Training.** List long-term assignments, courses, or programs through which you have increased your work skills and abilities (for example: Management Institute, Insurance Associations Claims course, extended university programs).

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**6. Career Interest.** As you look ahead, what do you see as your “ideal” career future? Please describe long-range goals, as well as intermediate and short-range options and assignments that may be interesting, challenging, or that you see as prerequisites for helping you accomplish your goals within the company.

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**7. Language.** Indicate which languages you write and speak fluently.

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**8. Mobility.** Are you willing to geographically relocate? \_\_\_\_\_

Are you willing to move to another sector? \_\_\_\_\_

Please describe any special circumstances that affect your geographic mobility at this time.

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**8a. Career Achievements/Skills.** As you look back over your career, what key achievements have you accomplished? Please briefly describe two or three of these here and the results accomplished. Use numbers where applicable. Be specific. Also describe key skills you feel you have developed.

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**9. Development Strategy.** What do you see as your development strategy/plan?

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Employee's Signature \_\_\_\_\_

Date \_\_\_\_\_

Reviewing Manager's Signature \_\_\_\_\_

Date \_\_\_\_\_

(denotes that preceding information is accurate to your best knowledge)

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