**MOMENTUM SPORTS**

*"Built for the Journey"*

**SUCCESSION PLANNING  
&  
HIGH-POTENTIAL EMPLOYEE MATRIX**

Strategic Talent Review

Prepared: January 2026

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# EXECUTIVE SUMMARY

This succession planning document provides a comprehensive assessment of Momentum Sports' leadership pipeline and talent development strategy. As a lean organization with 16 core employees managing $109.8M in annual revenue across three continents, identifying and developing future leaders is critical to sustaining our growth and operational excellence.

## Key Findings

* 7 high-potential employees identified (44% of core team)
* Strong internal succession candidates for 5 of 6 executive positions
* 3 critical roles require immediate development attention
* Average readiness timeline: 2-3 years for executive roles
* Development investment required: ~$150K annually for leadership programs

## Strategic Priorities

**1. Immediate Actions (0-6 months)**

* Identify emergency backup for General Manager role
* Cross-train Operations managers to mitigate single points of failure
* Implement structured mentoring program for high-potential employees

**2. Short-term Actions (6-18 months)**

* Develop COO and CFO successors through strategic project leadership
* Create leadership development curriculum for identified high-potentials
* Establish executive shadowing and rotation programs

**3. Long-term Actions (18-36 months)**

* Build bench strength for Sales Director and CTO positions
* Develop strategic talent acquisition plan for specialized roles
* Create clear career pathways for emerging talent

# HIGH-POTENTIAL EMPLOYEE MATRIX

The 9-Box Grid assesses employees on two dimensions: Performance (current results) and Potential (capacity for growth). This tool helps identify high-potential employees and informs development and succession planning decisions.

## 9-Box Talent Grid

|  |  |  |  |
| --- | --- | --- | --- |
| POTENTIAL → PERFORMANCE ↓ | Limited Potential | Moderate Potential | High Potential |
| High Performance | Solid Professional  Quinn Taylor Avery Wilson | Key Player  Morgan Davis Casey Brown | Future Leader  Jamie Patel Rowan Mitchell |
| Moderate Performance | Effective Professional  Jordan Parker | Growth Employee  Drew Collins Skyler Bennett | Emerging Talent  Samir Noor |
| Lower Performance | Performance Issue  (None identified) | Inconsistent Performer  (None identified) | Untested Potential  (None identified) |

# EXECUTIVE SUCCESSION PLANS

## General Manager (Alex Morgan, E001)

|  |  |
| --- | --- |
| Incumbent: | Alex Morgan (E001) - Tenure: 6.5 years |
| Criticality: | CRITICAL - Strategic leadership, board relations, P&L responsibility |
| Succession Risk: | HIGH |
| Primary Successor: | Jordan Lee (COO) - Readiness: 2-3 years |

**Development Plan - Jordan Lee:**

* Lead 2-3 strategic initiatives with board visibility
* Attend board meetings as observer, present quarterly
* Complete executive leadership program (external, 6-month)
* Shadow GM in FY2027 strategic planning cycle

## Chief Operating Officer (Jordan Lee, E002)

|  |  |
| --- | --- |
| Incumbent: | Jordan Lee (E002) - Tenure: 5.9 years |
| Criticality: | CRITICAL - Oversees 3 departments, logistics, customer service |
| Succession Risk: | MEDIUM |
| Primary Successor: | Quinn Taylor (Warehouse & Logistics Mgr) - Readiness: 2-3 years |

**Development Plan - Quinn Taylor:**

* Lead customer service improvement initiative
* Expand oversight to include supply chain (6-month rotation)
* Financial management training: P&L, budgeting, forecasting
* Monthly mentorship with current COO

## Chief Financial Officer (Taylor Singh, E003)

|  |  |
| --- | --- |
| Incumbent: | Taylor Singh (E003) - Tenure: 5.0 years |
| Criticality: | CRITICAL - Financial strategy, compliance, board reporting |
| Succession Risk: | LOW |
| Primary Successor: | Casey Brown (Finance Controller) - Readiness: 1-2 years |

**Development Plan - Casey Brown:**

* Expand role to include treasury and cash management
* Lead quarterly board financial presentations
* Complete CFO certification program (12-month external program)
* Shadow CFO in strategic M&A analysis

# HIGH-POTENTIAL EMPLOYEE PROFILES

The following employees have been identified as high-potential based on performance, leadership capacity, and strategic value to the organization.

## Jamie Patel - E-commerce Manager (E014)

|  |  |
| --- | --- |
| FUTURE LEADER - HIGH POTENTIAL | |
| Performance Rating: | 4.4/5.0 - Exceeds Expectations |
| Target Role: | Sales Director (2-3 years) |
| Key Strengths: | Digital commerce expertise, customer analytics, technical proficiency, project management |

**Development Focus:**

* B2B experience, broader commercial strategy, people leadership

## Rowan Mitchell - Marketing Manager (E011)

|  |  |
| --- | --- |
| FUTURE LEADER - HIGH POTENTIAL | |
| Performance Rating: | 4.3/5.0 - Exceeds Expectations |
| Target Role: | Sales Director (2-3 years) |
| Key Strengths: | Strategic marketing thinking, digital expertise, creative problem-solving, cross-functional collaboration |

**Development Focus:**

* Sales leadership, B2B channel dynamics, commercial negotiations

## Morgan Davis - Channel/Reseller Manager (E007)

|  |  |
| --- | --- |
| KEY PLAYER | |
| Performance Rating: | 4.5/5.0 - Exceeds Expectations |
| Target Role: | Sales Director (ready now to 1 year) |
| Key Strengths: | Relationship management (701 resellers), strategic thinking, B2B expertise, manages $80.5M revenue |

**Development Focus:**

* Financial acumen, direct-to-consumer experience, cross-functional leadership

# IMPLEMENTATION TIMELINE

|  |  |  |
| --- | --- | --- |
| Timeline | Priority Actions | Owner |
| Q1 2026 | • Communicate plan to board • Launch HiPo development program • Identify emergency GM backup | GM, HR Manager |
| Q2-Q3 2026 | • Begin cross-functional rotations • Enroll successors in leadership development • Implement mentoring program | Dept Heads, HR |
| Q4 2026 | • Mid-year talent review • Assess development progress • Adjust development plans | GM, HR Manager |
| 2027 | • Continue development programs • Promote ready candidates • Annual succession plan review | Executive Team |

# CONCLUSION

Momentum Sports has identified a strong pipeline of internal talent capable of assuming leadership positions across the organization. With focused development investments and structured progression plans, the company is well-positioned to maintain operational continuity and sustain growth momentum.

The succession planning process has identified 7 high-potential employees (44% of our core team), demonstrating the strength of our talent acquisition and development practices. However, three critical areas require immediate attention: GM emergency backup, operations cross-training, and CTO technical depth development.

Success will require sustained executive commitment to development activities, appropriate investment in leadership training, and regular monitoring of progress against readiness timelines. This succession plan should be reviewed and updated annually, with quarterly check-ins on high-potential employee development.

**END OF DOCUMENT**

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