



HR DELIVERY

Making Sure HR Delivers

HR DELIVERY WORKSHOP SERIES

Succession Planning

Succession Planning: Critical Roles and Credible Readiness

Use the S8 framework to explore continuity risk and future-role requirements. Practise examining readiness evidence, distinguishing emergency cover from succession and proposing development actions that build options without promising appointments.



01 DAY

Introductory taster

IN-HOUSE

Your people. Your context.

PRACTICAL

Explore, discuss and apply

A PRACTICAL STARTING POINT

Understand the topic. Try it in practice.

A succession chart can look complete while the organisation remains exposed. One candidate may appear against several roles, current performance may be mistaken for future readiness and emergency cover may depend on unavailable people. This workshop introduces a more disciplined conversation about critical work, evidence, employee aspirations and development that strengthens realistic options.

Participants use the S8 Succession Planning Framework to examine one illustrative critical role. They draft future requirements, review incomplete candidate evidence and test continuity assumptions, then propose development and assurance actions with clear ownership while keeping readiness separate from an appointment decision.

WHO IS IT FOR?

HR and talent practitioners, business leaders, functional managers and workforce planners who contribute to succession discussions and need a practical introduction to role criticality, readiness evidence and continuity planning.

BY THE END OF THE DAY, PARTICIPANTS CAN:

- 01 Identify critical work**
Explain why a role may be strategically or operationally critical without relying solely on seniority, visibility or the incumbent's reputation.
- 02 Specify future requirements**
Draft selected future-role outcomes and capability expectations that would guide evidence gathering before considering named candidates for the role.
- 03 Separate key judgements**
Distinguish current performance, aspiration, emergency cover and future-role readiness, identifying why one cannot automatically substitute for another in succession discussions.
- 04 Evaluate readiness evidence**
Review a small candidate evidence set against role requirements, recording gaps, contradictory information and confidence limits rather than inventing certainty.
- 05 Test continuity exposure**
Identify a dependency created by a candidate covering several roles and propose questions that test availability and realistic emergency arrangements.
- 06 Plan development and review**
Draft an experience-based development action with support, evidence and review, recognising that succession planning creates options rather than appointment guarantees.

A useful first application

An introductory case workshop on succession reasoning and records. It does not assess named employees, confirm successor readiness, allocate promotion outcomes or establish a complete organisational succession and continuity plan.

THE FRAMEWORK / WORKSHOP FOCUS

HR Delivery S8 Succession Planning Framework

The eight stages are Scan, Segment, Specify, Source, Scrutinise, Synchronise, Strengthen and Sustain. They connect future strategic work, critical roles, candidate evidence, calibrated readiness and development with continuing assurance of succession risk.



SIX QUESTIONS TO EXPLORE IN THE WORKSHOP

01 Future critical work

Which future work creates a material strategic or continuity exposure?

03 Supply and aspiration

Where could credible candidates come from, and what do they want?

05 Continuity and dependencies

Could emergency cover work if several vacancies occurred together?

02 Role standard

What outcomes and capability will success in this role require?

04 Evidence and readiness

What evidence supports readiness, and which critical gaps remain unresolved?

06 Development and assurance

Which experiences, support and reviews would strengthen credible succession options?

These six workshop focus questions explore a bounded role within the full S8 cycle. Named employee information requires appropriate governance; case judgements remain illustrative and do not authorise appointment, promotion or professional practice decisions.

[Explore the full model >](#)

LEARN BY DOING

Explore. Challenge. Make the ideas useful.

Short explanations lead into lively exercises, paired discussion and small-group challenges. Participants test ideas, share experience and build a draft together. The tone is engaging and enjoyable, with time to reflect and connect learning to real work.

01 Critical role, famous person

Groups compare role cards with names and grades concealed, prioritising continuity impact. They then see incumbent details and discuss how reputation could distort a role-focused assessment of risk.

02 Define success before names

Pairs draft a future-role profile for a changing technical leadership position. They test whether the requirements are observable and whether they reflect future work rather than copying the incumbent.

03 The evidence calibration table

Teams independently review a fictional candidate dossier, compare conclusions and explain disagreement. They separate missing evidence from a demonstrated gap and record conditions behind a provisional readiness view.

04 Stress-test the succession chart

Participants receive a seemingly healthy succession map, then face two simultaneous vacancies. They identify repeated candidates, availability constraints and immediate cover needs before proposing development and external supply questions.

DIAGNOSE BEFORE YOU ACT

Evidence > shared feedback > agreed priorities

Use selected diagnostic prompts to distinguish known facts from assumptions. Discuss the findings and agree their meaning before proposing a solution. Feedback is part of diagnosis, not an afterthought.

ONE CASE, DEVELOPED THROUGH THE DAY

A specialist service relies on one technical authority approaching retirement. A high-performing deputy is listed as successor, emergency cover and candidate for another pivotal role. Their interest in the future position is unconfirmed, and the new role will involve broader judgement, stakeholder accountability and responsibilities they have not yet demonstrated.

Groups define the future standard, review the fictional evidence and test simultaneous vacancies, then propose a development experience and separate continuity action with owners and review conditions.

THE FACILITATOR WILL

Invite different perspectives.

Make assumptions visible.

Welcome constructive debate.

Capture practical learning.



SAMPLE WORKSHOP AGENDA

A working day, with room to think.

09:00-16:30 | Six hours of facilitated learning, plus lunch and breaks. The agenda, emphasis and timings are always agreed with the client, including local scheduling needs.

09:00-09:20	Welcome and succession assumptions Examine a succession chart and identify assumptions about role importance, candidate availability, aspiration and readiness that may conceal organisational exposure.
09:20-10:15	Explore S8 and critical roles Connect the eight-stage cycle to strategic demand and distinguish role criticality from the current likelihood or timing of a vacancy.
10:15-10:30	Break
10:30-11:30	Define future-role requirements Draft future outcomes, scope and capability expectations before reviewing candidates, checking how future work differs from the incumbent's current responsibilities.
11:30-12:30	Review evidence and readiness Review fictional evidence against the role standard, distinguishing performance, aspiration, emergency cover and readiness while recording gaps and uncertainty.
12:30-13:30	Lunch
13:30-14:30	Calibrate and test portfolio exposure Compare readiness judgements and test repeated candidates against simultaneous vacancies, keeping emergency cover distinct from succession development.
14:30-14:45	Break
14:45-15:30	Design development and continuity actions Propose supported experiences for specific role gaps, alongside continuity arrangements when internal preparation cannot meet the organisation's immediate needs.
15:30-16:10	Challenge the succession recommendation Present the role, evidence limitations and proposed actions, refining ownership and conditions behind a provisional readiness conclusion through peer challenge.
16:10-16:30	Plan a bounded succession conversation Choose a role-level inquiry with the business owner, recording governance, evidence and employee engagement requirements before collecting named candidate information.

Protect critical future work by linking role standards, current evidence and owned development with realistic continuity options.

FROM THE SESSION TO YOUR DESK

Useful models. Practical working records.

The day combines reference materials with drafts developed in the exercises. Each has a clear use beyond the workshop; the work reflects the evidence and perspectives available in the room.

01 Eight-stage succession reference

A concise guide to the complete S8 cycle, showing how strategic demand, roles, evidence and development connect with continuing assurance rather than ending at a named succession chart.

Use it to structure a more evidence-based succession conversation.

02 Critical-role inquiry worksheet

A case record distinguishing strategic and continuity impact from vacancy exposure, with prompts to examine scarce expertise, service dependence and the consequences of losing the role's contribution.

Use it to discuss role criticality before considering individual candidates.

03 Future-role profile draft

Selected future outcomes, capability requirements and scope expectations, written before names enter the discussion and checked for observable evidence that could inform a proportionate assessment of readiness.

Use it to establish a common standard for evidence gathering.

04 Readiness evidence record

A worked comparison of fictional candidate evidence with role requirements, separating demonstrated gaps, missing information, aspiration and confidence, with conditions attached to the provisional conclusion for later review.

Use it to keep a readiness discussion within the available evidence.

05 Continuity dependency map

A case map revealing repeated candidates, simultaneous vacancies and emergency cover questions, with immediate continuity actions distinguished from preparation needed to assume the full role.

Use it to test whether apparent succession coverage is realistic.

06 Development and assurance starter

A draft supported experience, evidence milestone and review arrangement for one future-role gap, accompanied by the business ownership and resources needed to turn a succession intention into action.

Use it to connect succession discussion with a practical development commitment.

CONTINUE EXPLORING

Continue with the models, diagnostic manuals and development resources on the HR Delivery website. Workshop exercises provide a first application; a full organisational diagnostic or implementation assignment can be agreed separately.

[Open the framework >](#)

[Explore diagnostic resources >](#)



MAKE THE LEARNING COUNT

A better conversation. A practical next step.

Begin with one potentially critical role and its future requirements. Agree governance and ownership before considering candidates, check immediate cover separately and identify the evidence or development experience needed to improve the organisation's understanding of realistic succession options.

YOUR FIRST 30 DAYS

01

Days 1-7

Agree the role-level inquiry

Confirm the business owner, scope and information safeguards. Discuss why the role may be critical and how future demands could alter its requirements before introducing any named successor candidates.

02

Days 8-21

Clarify role and exposure

Draft the future-role requirements with relevant specialists and review emergency cover. Identify evidence needs, candidate concentration and aspiration questions, keeping untested assumptions visible in the working record throughout the inquiry.

03

Days 22-30

Agree an owned next step

Review the role profile and continuity questions with the owner. Agree appropriate evidence gathering or a supported development experience, with resources and a review date rather than an unsupported readiness label.

Follow-through is participant-led. Additional facilitation, a full diagnostic or specialist support can be agreed separately.

AVAILABLE IN-HOUSE

Shaped around your organisation

The client identifies a role family or anonymised critical-role scenario and any existing succession governance. Participants bring role outcomes and continuity questions; named candidate lists, confidential ratings and unagreed assessment data are unnecessary for this introductory day.

PLAN YOUR IN-HOUSE WORKSHOP

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Discuss your workshop



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