

HR14 · STEP 5 · FINAL

Succession Planning

## Succession Plan

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Leadership-ready plan combining bench view, gap analysis, role-level action blocks, and implementation timeline for critical roles.

### ABOUT THIS DOCUMENT

This is a **sample** deliverable from the **Succession Planning** workflow (HR14) in AGASI AiOS. It shows the expected structure and tone. All names, numbers, and facts are **fictional**.

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# Succession Plan

**Organisation:** Northbridge Advisory Partners **Assessment Cycle:** Current promotion and succession review window **Prepared By:** HR Business Partner, People & Culture **Reviewed By:** Talent Management Lead **Approved By:** Pending — HR Director, People & Culture **Confidentiality:** Internal - Restrict Access

## Executive Summary

Northbridge Advisory Partners assessed four critical roles for succession readiness following the current promotion calibration cycle. No role has a Ready Now successor. Three of four roles are rated Thin for bench strength, with one (Director of Client Delivery) rated Adequate but facing imminent vacancy. The most pressing priority is establishing interim coverage for the Director of Client Delivery, where the incumbent departs within 60 days and the strongest successor requires 6-12 months of development. Leadership should also address the candidate concentration risk: the Principal Consultant, Strategy & Operations is the strongest pipeline candidate for two of four critical roles, meaning the organisation must decide which succession path to prioritise.

## Bench Strength Overview

Role ID	Role Title	Total Candidates	Ready Now	Ready 1-2 Years	Development Needed	Not Ready	Bench Rating	Risk Note
CR-1	Practice Head, Data & AI Advisory	1	0	1	0	0	Thin	Single candidate at Ready 1-2 Years. Knowledge-sharing and strategic planning gaps require development before practice leadership.
CR-2	Director of Client Delivery	2	0	1	1	0	Adequate	One candidate at Ready 1-2 Years with strong commercial credentials. One at Development Needed due to persistent delegation gap.
CR-3	Head of Technology Advisory	1	0	1	0	0	Thin	Single candidate at Ready 1-2 Years. Delegation and business development gaps flagged. No backup candidate.
CR-4	Head of People Operations	2	0	0	1	1	Thin	No candidates above Development Needed. Outdated assessment data reduces confidence.

**Rating Distribution:** Strong: 0 | Adequate: 1 | Thin: 3 | Critical: 0

## Succession Gap Analysis

### Priority Gap Table

Role ID	Role Title	Bench Rating	Vacancy Risk	Gap Severity	Gap Description
CR-2	Director of Client Delivery	Adequate	Imminent	High	Incumbent departing within 60 days. Strongest successor at Ready 1-2 Years, not Ready Now. No interim coverage documented.
CR-1	Practice Head, Data & AI Advisory	Thin	Near-term	High	Single successor candidate also mapped to CR-2, creating single-point dependency. Knowledge sharing and strategic planning gaps unaddressed.
CR-3	Head of Technology Advisory	Thin	Planned	Moderate	Single successor with delegation and business development gaps. Planned vacancy horizon provides runway but no backup candidate exists.
CR-4	Head of People Operations	Thin	Unknown	Moderate	Neither candidate above Development Needed. Outdated assessment and unassessed vacancy risk compound the gap.

## Cross-Cutting Themes

- **No Ready Now candidates across the portfolio.** Every succession scenario requires interim coverage or accelerated development.
  - **Candidate concentration risk.** The Principal Consultant, Strategy & Operations is the strongest candidate for both CR-1 and CR-2. A deployment decision for one role degrades the other's pipeline.
  - **Systemic delegation and knowledge-sharing gaps.** Three of five successor candidates share these development areas, suggesting a firm-wide development shortfall rather than isolated issues.
  - **Data quality gaps reduce assessment reliability.** Missing review dates, deprecated labels, and legacy rating scales require clean-up before the next cycle.
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## Action Recommendations

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### CR-2 — Director of Client Delivery

- **Gap Severity:** High
- **Immediate Action:** Establish an acting Director arrangement with the Principal Consultant, Strategy & Operations upon the incumbent's departure, with a formal handover plan covering post-acquisition integration coordination and client escalation protocols.
- **Development Actions:**
  - Stretch Assignment — Shadow lead on one executive steering committee during the notice period.
  - Targeted Training — Complete the deferred Financial Modelling elective in the next plan quarter.
  - Cross-Functional Exposure — Participate in the next cross-practice resource planning sessions.
- **Acceleration Option:** COO serves as interim co-lead for the first 30 days if handover is incomplete.
- **Timeline:** Immediate transition within 60 days. Full readiness target within 6 months post-appointment.
- **Success Indicator:** Acting Director manages one cross-practice resource allocation cycle and one client escalation independently.

### CR-1 — Practice Head, Data & AI Advisory

- **Gap Severity:** High
- **Immediate Action:** Formalise the Principal Consultant as identified successor. If deployed to CR-2, escalate CR-1 for external pipeline or alternative candidate identification.
- **Development Actions:**
  - Mentoring — Monthly practice strategy sessions with the current Practice Head covering P&L, client portfolio, and headcount planning.
  - Stretch Assignment — Lead one Data & AI business development pursuit in the subsequent plan quarter.
  - Knowledge Sharing — Deliver two sessions within the Data & AI practice to build visibility and credibility.
- **Acceleration Option:** Initiate a parallel external search if the incumbent's transition accelerates to under 12 months.
- **Timeline:** 18-month development sprint targeting Ready Now by end of long-range development window.
- **Success Indicator:** Successor leads one Data & AI business development pursuit from proposal to decision with positive practice team feedback.

### CR-3 — Head of Technology Advisory

- **Gap Severity:** Moderate
- **Immediate Action:** Formalise the Lead Engineer as identified successor. Document a development agreement with milestone reviews.
- **Development Actions:**
  - Coaching — Continue team leadership coaching with delegation targets (team leads making two client-facing decisions per week without escalation).
  - Stretch Assignment — Pair with an Engagement Manager on two proposals in the next two plan quarters; Lead Engineer drafts technical scope and pricing.
  - Cross-Functional Exposure — Attend one quarterly client portfolio review with the Managing Partner.
- **Acceleration Option:** Transition to Deputy Head arrangement with shared client ownership for top three accounts if timeline shortens.
- **Timeline:** 24-month development sprint targeting Ready Now by end of extended development window.
- **Success Indicator:** Leads one proposal end-to-end with documented commercial outcome; peer feedback confirms sustained delegation change over two quarters.

## CR-4 — Head of People Operations

- **Gap Severity:** Moderate
- **Immediate Action:** Conduct a formal vacancy risk assessment with the current incumbent and HR Director. Update the registry entry to the approved criticality scale.
- **Development Actions:**
  - Targeted Training — Address the Senior HR Business Partner's HRIS proficiency gap through a structured programme co-designed with the HRIS Administrator.
  - Stretch Assignment — Senior HR Business Partner leads one of the nine overdue policy reviews end-to-end.
  - Mentoring — Current Head of People Operations mentors the Employee Relations Specialist to broaden exposure beyond ER casework.
- **Acceleration Option:** Shared leadership arrangement (Senior HR Business Partner on operations, Employee Relations Specialist on ER casework) if vacancy materialises before either candidate reaches Ready 1-2 Years.
- **Timeline:** 12-month sprint for the Senior HR Business Partner to reach Ready 1-2 Years. 24-month horizon for the Employee Relations Specialist.
- **Success Indicator:** Senior HR Business Partner completes one policy review independently and produces one quarterly compliance report without HRIS Administrator assistance.

## Implementation Timeline

Role ID	Role Title	Gap Severity	Key Action	Target Completion	Owner
CR-2	Director of Client Delivery	High	Acting Director appointment and handover plan	Within notice-period window (date on file)	COO and HR Business Partner
CR-2	Director of Client Delivery	High	Full readiness development (training, cross-functional exposure)	Mid follow-up development window	Talent Management Lead
CR-1	Practice Head, Data & AI Advisory	High	Formalise successor and initiate mentoring/exposure programme	Next major checkpoint (HRBP to schedule)	HR Business Partner and Practice Head, Data & AI Advisory
CR-1	Practice Head, Data & AI Advisory	High	Ready Now target	End of long-range window	Talent Management Lead
CR-3	Head of Technology Advisory	Moderate	Formalise successor and document development agreement	Next major checkpoint (HRBP to schedule)	HR Business Partner and Practice Head, Technology Advisory
CR-3	Head of Technology Advisory	Moderate	Ready Now target	End of extended window	Talent Management Lead
CR-4	Head of People Operations	Moderate	Vacancy risk assessment and registry clean-up	Next major checkpoint (HR Director to schedule)	HR Director and HRIS Administrator
CR-4	Head of People Operations	Moderate	Senior HR Business Partner reaches Ready 1-2 Years	Follow-up readiness checkpoint	HR Business Partner and L&D Manager

## Review Cadence

- **Regular review:** The succession plan will be reassessed at each promotion calibration cycle (H1 and H2), aligned with Section 7.1 of the Succession Policy Guidelines. The next scheduled review is the next H1 panel cycle.
- **Off-cycle trigger — CR-2:** Given the imminent vacancy, the Talent Management Lead will conduct a 30-day progress check on the CR-2 handover plan and acting Director transition by the follow-up date agreed with the COO.
- **Off-cycle trigger — candidate deployment decision:** If the Principal Consultant, Strategy & Operations is confirmed for the CR-2 acting role, the HR Business Partner must immediately reassess CR-1 bench strength and escalate if the pipeline falls to Critical.