

Prepare your people. Plan for continuity.

A practical starting point for business owners, leaders and HR teams.

Start with one critical role

Choose a role whose absence would disrupt essential work. Work through the templates with the relevant manager, then agree actions and a review date.

How to use this kit

01 Prioritise roles

Use page 2 to decide where planning should start.

02 Review readiness

Use page 3 for one potential successor and one target role.

03 Agree development

Use page 4 to turn capability gaps into specific actions.

04 Share knowledge

Use page 5 to plan documentation and supervised practice.

05 Prepare and review

Use pages 6-7 for cover, handover and review arrangements.

Print or annotate these worksheets in your PDF reader. They are not fillable form fields. Reuse pages 2-7 for additional roles. Page 8 provides a fictional worked example.

Keep the process thoughtful

Use role-related evidence and employee aspirations. A potential successor is not a guaranteed appointment. Keep completed worksheets accessible only to authorised people.

Identify a critical role

Complete one sheet per role, then compare roles to decide which to address first.

Organisation / team

Role and current role holder

Which essential outcomes does this role own?

What would be disrupted if the role were vacant tomorrow?

Who could provide temporary cover?

Where are the main skill or knowledge gaps?

Role-priority checklist

- ☐ Essential work would stop or slow without this role.
- ☐ Only one person holds key knowledge or relationships.
- ☐ Recruiting or developing a replacement could take time.
- ☐ A retirement, move or change in responsibilities is approaching.

Use the checklist to prompt discussion, not as a validated score. Consider the impact, timing and existing cover together.

Priority: urgent / next / monitor - why?

Planning owner and target review date

Review successor readiness

Complete with the relevant manager. Record evidence and discuss the employee’s interests.

Target role / potential successor	Reviewer / date

Career interest and willingness: what has the employee said?

Compare evidence with the target role

Capability needed	Evidence observed	Gap or support needed

Working readiness descriptions

Ready now: evidence supports taking on the role with an agreed handover.
Developing: specific gaps need practical experience or learning.
Not yet established: evidence or employee interest needs further discussion.

Current readiness, supporting reasons and any assumptions

Experience or evidence still needed	Next conversation / review date

Agree a development plan

Choose a few meaningful actions. Define what successful application would look like.

Employee / target role

Manager / plan date

Priority capability gap and why it matters

Action 1

Activity / assignment:

Support / owner:

Due:

Evidence of progress:

Action 2

Activity / assignment:

Support / owner:

Due:

Evidence of progress:

Action 3

Activity / assignment:

Support / owner:

Due:

Evidence of progress:

Possible actions: job shadowing, mentoring, cross-training, a supervised project, acting responsibilities or targeted learning. Check capacity and access to support before agreeing deadlines.

First progress discussion

What support could prevent delays?

Capture and transfer knowledge

Complete one sheet per critical process, responsibility or relationship.

Role / knowledge area	Knowledge holder / person learning

What must another person be able to understand or do?

Where is the current documentation?	What needs to be updated or created?

How will knowledge be shared? Include practice, not just reading.

Session / handover date and owner	How will understanding be demonstrated?

Dependencies: people, systems, access approvals or key contacts

Handover completion checks

- ☐ Documents are current and stored in an agreed location.
- ☐ The receiving person has practised and asked questions.
- ☐ Access is approved and unresolved issues have an owner.

Do not record passwords or access credentials here. Refer to approved access procedures. Keep customer and employee information in its authorised system.

Prepare for a transition

Plan interim cover as well as the longer-term appointment or development route.

Role / planning owner	Scenario: planned move or unexpected absence

What would trigger this plan, and who activates it?

Interim role holder / backup	Authority and limits: what can they decide?

First priorities: what needs attention in the first working days?

Communication: who needs to know, who informs them and when?

Longer-term route: develop / recruit / other	Approvals, resources and target dates

Handover milestones and evidence that responsibilities have transferred

Confirm interim responsibilities with those involved. Do not assume that an available colleague has the capacity, authority or willingness to provide cover.

Review the plan over 90 days

Use these checkpoints as a starting suggestion; adapt the timing to the role and business.

Role / plan owner

Plan agreed on / next formal review

First 30 days - establish the foundations
Confirm critical responsibilities, discuss interest and agree the first development actions.

Days 31-60 - practise and transfer
Review practical assignments, share knowledge and remove obstacles to progress.

Days 61-90 - review and adjust
Check evidence of readiness, revisit interim cover and agree the next phase.

At every review, ask:

What evidence has changed? What support is still missing? Have the role or the employee’s aspirations changed? Are cover arrangements still realistic?

Decision / change agreed

Action owner / due date

Review sooner after a departure, promotion, restructure or significant change in business needs.

Worked example: one critical role

Fictional illustration only. This is a starting point for discussion, not a readiness assessment.

Situation

A small design consultancy relies on its technical team lead to coordinate drawing reviews and maintain project standards. There is no immediate departure planned, but cover is limited.

Critical-role priority

The role is a priority because work needs review before issue and key process knowledge sits with one person. The director will own the succession plan.

Potential successor and evidence

A senior team member is interested in broader responsibility. They have led two internal reviews but have not yet managed the full workload or a difficult client escalation. Readiness is recorded as developing.

Development action

Over the next eight weeks, the team member will lead two supervised review cycles. The technical lead will provide feedback on quality, prioritisation and communication after each cycle.

Knowledge transfer

The technical lead and team member will update the review checklist, walk through one completed project and record where current standards and templates are stored.

Interim cover and review

The director will approve final outputs if the technical lead is unavailable. The team member will coordinate reviews within agreed limits. Progress will be discussed at days 30, 60 and 90; an appointment is not promised.

Need help turning this into a working plan?

The Human Aspect supports succession planning, leadership and HR advisory. Email info@humanaspect.co.za with your organisation, approximate team size and the roles you are planning for.