



SUCCESSION PRESSURE-TEST GUIDE FOR HR LEADERS

Names on a slate are not a bench

Run five pressure tests on any succession slate, score bench health in ten minutes, and turn what you find into owned, dated actions.

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HOW TO USE THIS PDF

Type straight into the boxes on screen and save your copy, or print it and write by hand. Rating scales add up on their own in most PDF readers, including Adobe Acrobat and Chrome. Every heading above is a link.



START HERE

Stated depth vs realistic depth

A succession plan is only as strong as the assumptions behind it. Names on a slate show stated depth. Pressure-testing shows whether those successors are genuinely viable if the role opened tomorrow.

Stated depth

The number of names listed on the plan. Easy to count, and easy to overestimate.

Realistic depth

Successors who remain viable after readiness, evidence, interest, feasibility and availability are examined, plus overlooked candidates brought into view.

Four principles for every talent conversation

Readiness and learning agility

Focus on readiness and learning agility when assessing people for mission-critical roles.

Mobility and growth first

Use talent reviews to unlock lateral moves and development, never only to assign labels.

Fair calibration across teams

Calibrate openly across departments so standards stay consistent and defensible.

Business priorities anchor

Tie every talent conversation to current and emerging business priorities.

PROMPTS FOR DISCUSSION, NOT RANKINGS

Everything in this guide is designed to structure a disciplined conversation. Scores are signals. They do not replace judgment, employee dialogue or appropriate confidentiality controls.



TEST THE SLATE

The five pressure tests

Work through each test for one critical role. Tick each question you can answer with confidence. Unticked boxes are where your realistic depth is lower than it looks.

01 Development momentum

Has readiness actually moved?

- ☐ Has the readiness horizon shifted since the last review?
- ☐ Did development actions lead to observable growth, not just activity?
- ☐ Is this person still a feasible successor for this specific role?

Why it matters: A lack of progress can signal a development stall, or a mismatch between the role and the successor's direction.

02 Successor distribution

Count each person once.

- ☐ How many plans does each person appear on?
- ☐ Which one role could they realistically fill if several opened at once?
- ☐ How does depth change when each person is counted only once?

Why it matters: Leaning on the same few people overstates bench strength and hides continuity gaps.

03 Evidence strength

More than one leader's opinion?

- ☐ Is readiness supported by evidence from several leaders?
- ☐ Is the evidence recent, and from work at a relevant scale?
- ☐ Would this person genuinely be considered if the role opened tomorrow?

Why it matters: Evidence-light nominations inflate depth and make decisions more open to bias.



04 Interest and feasibility

Confirmed, not assumed.

- ☐ Has the successor said they want this kind of role?
- ☐ Have mobility, location or timing constraints been discussed with them?
- ☐ Has their career direction changed since the slate was built?

Why it matters: A name is not an option if the person is not interested or the move is not feasible. Confirm through a real career conversation.

05 Broader talent discovery

Who is missing?

- ☐ Have we looked at adjacent and cross-functional talent?
- ☐ Are our criteria narrowing the pool without meaning to?
- ☐ Who capable is missing from the current slate?

Why it matters: Familiarity with the immediate team can hide strong talent elsewhere in the organization.

What the five tests revealed for this role

Where is realistic depth lower than stated depth, and why?



WORKSHEET

Slate pressure-test worksheet

Use one sheet per critical role. List each named successor, tick every test they pass, then count the people who pass all five. That number is your realistic depth.

Critical role

Review date

Named successor	Moved	Once	Proof	Interest	Feasible	Readiness horizon
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	

Moved = development momentum · **Once** = still counts when each person is counted only once · **Proof** = evidence from more than one leader · **Interest** = confirmed in conversation · **Feasible** = mobility and timing work

Stated depth (names on the plan)

Realistic depth (passed all five)

Broader talent discovery

Who capable is missing from this slate? Look across adjacent teams and functions.

Possible successor	Current role and team	Why they belong in the conversation



SCORE IT

Bench health score

Rate the five dimensions for this role from 1 to 5. Capability gaps and risk are scored so that higher means worse; the total reverses them for you, so a higher total always means a healthier bench.

	RATING	EVIDENCE / EXAMPLE
Depth How many viable successors exist? 1 = none · 2 = one · 4 = two · 5 = three or more	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐	
Quality How strong is the pool on capability, experience, behavior and growth? 1 = limited evidence · 5 = strong, consistent evidence	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐	
Capability gaps How large are the missing skills, experiences or behaviors? 1 = small · 5 = large	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐	
Readiness How soon could the strongest successor step in? 1 = external hire needed · 3 = 24–36 months · 5 = ready now	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐	
Risk Role criticality, retention risk and mobility limits combined. 1 = low exposure · 5 = high exposure	1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐	

Bench health (5–25)

Reading

Bench health = Depth + Quality + (6 – Gaps) + Readiness + (6 – Risk). 20–25 strong, 15–19 moderate, 10–14 weak, 5–9 critical.

Readiness horizons at a glance

Horizon	What it means
Ready now	Evidence supports a move now, with normal onboarding.
12–24 months	Targeted gaps can be closed with one or two focused experiences.
24–36 months	Broader experience and sustained evidence are still needed.
36+ months	Longer-term pipeline. Not near-term coverage; revalidate interest over time.



ACT

From findings to action

Every high-risk finding needs an owner and a date. Choose the lever that fits: develop, move, retain, redesign the role, or search externally.

Finding or risk	Action (develop, move, retain, redesign, search)	Owner	By when

Close the gap with real experience

Prioritize real work practice, reinforce it through coaching and relationships, and add formal learning where it helps. Treat 70-20-10 as a design guide, not a quota.

Stretch assignment or rotation

Cross-functional exposure

Coaching or sponsorship

Next review date for this slate

Governance check before the next review

- ☐ Role criteria and rating anchors are consistent across business units.
- ☐ Every readiness horizon has supporting evidence from more than one leader.
- ☐ We know where we rely on one person or one pathway.
- ☐ Each action has an owner and a date.
- ☐ Access to identifiable succession information is restricted to those who need it.



NEXT STEPS

Keep going

Pick the next step that fits where you are.

Do it yourself: the HR Practitioner Workbook

Bench health, succession risk, calibration and readiness tools for your own team, in one self-guided workbook.

Get an outside view: Succession Process Evaluation

An independent review of your succession process: evaluate, diagnose, then a prioritized roadmap with guidance to put it in place.

[Ask about the workbook](#)[Request an evaluation](#)

More succession tools, including the Balanced People Scorecard and the five-step calibration workflow, are on the [HR Leaders page](#).

Follow [@nextlvluptalent](#) on Instagram for more tools you can put to work this week. Questions? info@nextleveluptalent.com