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COURSE BROCHURE

Succession Slate and Readiness Assessment Training Course

4 – 15 January 2027
Milan

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Registered in the United Kingdom and Saudi Arabia

Succession Slate and Readiness Assessment Training Course

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Succession Slate and Readiness Assessment is a 2-week advanced training course for HR business partners and talent development leads who prepare successor lists for critical roles, built around one work product: a critical role succession slate pack. Boards and executive committees now ask for evidence, not names on a chart, when they test continuity of key positions. This course on succession slate and readiness assessment is delivered by Jupiter Prime Training.

Why Succession Slate and Readiness Assessment Matters Now

Three groups are sharpening scrutiny of succession slates: directors who want defensible cover for every critical role, business heads who resist losing strong performers to other units, and employees who expect transparent, bias-checked nomination decisions. A credible slate lets an organisation fill a sudden vacancy within weeks and keep institutional knowledge; a weak one leaves acting incumbents, rushed external searches and disputed appointments. The course draws on human capital reporting guidance in ISO 30414, structured behavioural interviewing, assessment centre design and calibration practice used in talent review meetings.

Who Gains Most from Succession Slate and Readiness Assessment

- Partners who advise business heads on which roles need named successors and emergency cover
- Specialists who gather evidence on candidate readiness from interviews, assessments and track records
- Facilitators who prepare and run calibration sessions where slates are challenged and agreed
- Analysts who maintain succession data, coverage ratios and risk flags for executive reporting
- Talent leads who connect readiness gaps to targeted development actions and successor moves

The greatest gain comes when an HR business partner team attends with its talent and analytics colleagues, so the slates they bring back follow one shared evidence standard.

Succession Slate and Readiness Assessment Capabilities

Participants move from informal successor nominations to evidence-based slates that withstand challenge from executives, boards and the candidates themselves.

- Specify which positions are critical using impact, scarcity and vacancy risk criteria — the executive committee setting succession scope
- Assess successor readiness against role-specific success profiles — the business head choosing between internal candidates
- Design readiness evidence packs combining interviews, assessments and performance history — the calibration panel testing nominations
- Calculate slate coverage, depth and diversity indicators — the board reviewing continuity risk
- Test slates for bias, over-nomination and blocked candidates — the HR director protecting fairness
- Communicate slate outcomes and readiness gaps to candidates and their managers — the line leaders funding successor development

Key Succession Slate and Readiness Assessment Terms

- Succession slate — a ranked list of named candidates for one critical role, each with a readiness rating and evidence summary.
- Critical role — a position whose sudden vacancy would seriously disrupt strategy, operations, safety or key relationships.
- Readiness rating — a judgement of when a candidate could step into a role, such as ready now or ready later.
- Emergency cover — the person who would hold a critical role temporarily if the incumbent left without notice.
- Slate depth — the number of credible candidates named for a role across readiness bands.
- Calibration session — a facilitated meeting where leaders compare evidence and agree consistent ratings across candidates and units.

Succession Slate and Readiness Assessment Day by Day

Day 1: Continuity Risk and the HR Business Partner Role

- Continuity Risk Heat Map — Locating Exposure Across Business Units
- HR Business Partner Mandate in Succession — Clarifying Advisory and Decision Rights
- Board and Executive Expectations — Translating Oversight Questions Into Slate Requirements
- Succession Policy Review — Checking Scope, Ownership and Review Cycles
- Current Slate Audit — Measuring Gaps Between Charts and Evidence

Day 2: Identifying Critical Roles

- Role Criticality Criteria — Weighing Impact, Scarcity and Vacancy Risk
- Incumbent Departure Risk Signals — Anticipating Retirement, Mobility and Flight Risk
- Critical Role Register — Agreeing Which Positions Require Named Successors
- Technical and Specialist Roles — Extending Succession Beyond the Executive Layer
- Role Clustering for Shared Slates — Covering Similar Positions With One Pool

Day 3: Success Profiles for Target Roles

- Role-Specific Success Profiles — Defining Experiences, Capabilities and Context Demands
- Future Role Requirements — Adjusting Profiles to Strategic Shifts
- Derailer and Risk Factors — Identifying Behaviours That Disqualify Candidates
- Stakeholder Input Interviews — Capturing Business Head Views on Role Needs
- Profile Validation With Incumbents — Testing Realism Before Assessment Begins

Day 4: Sourcing Candidates for the Slate

- Nomination Channels — Balancing Manager Referral, Talent Data and Self-Nomination
- Cross-Unit Candidate Search — Breaking Silos That Hide Internal Talent
- External Benchmark Candidates — Testing Internal Slates Against the Market
- Over-Nominated and Hidden Candidates — Correcting Visibility Bias Early
- Long List to Short List Rules — Applying Transparent Screening Criteria

Day 5: Gathering Readiness Evidence

- Structured Behavioural Interviews — Probing Evidence Against the Success Profile
- Assessment Centre Exercises — Observing Candidates in Role-Like Situations
- Multi-Rater Feedback Inputs — Weighing Peer, Report and Manager Perspectives
- Track Record Review — Reading Results in Context of Role Scope
- Psychometric Instruments — Selecting Validated Tools and Interpreting Results Carefully

Day 6: Rating Readiness

- Readiness Bands — Defining Ready Now, Ready Later and Emergency Cover
- Evidence Weighting Rules — Combining Sources Into One Defensible Rating
- Gap Analysis Against Success Profiles — Naming the Experiences Still Missing
- Readiness Evidence Pack Template — Standardising What Panels Receive
- Candidate Mobility and Aspiration Checks — Confirming Willingness to Move

Day 7: Running Calibration Sessions

- Calibration Session Design — Setting Agenda, Roles and Ground Rules
- Facilitation Techniques for Challenge — Questioning Ratings Without Personal Conflict
- Bias Interrupters — Countering Similarity, Recency and Halo Effects
- Decision Logs and Rationale Capture — Recording Why Ratings Changed
- Handling Blocked Candidates — Resolving Managers Who Withhold Strong Performers

Day 8: Slate Metrics and Executive Reporting

- Coverage Ratio and Slate Depth — Showing Continuity Strength for Each Role
- Diversity of Slates — Tracking Representation Across Readiness Bands
- Succession Reporting Under ISO 30414 — Presenting Human Capital Metrics Consistently
- Board Succession Dashboard — Highlighting Roles With No Ready Candidate
- Slate Hit Rate — Measuring How Often Named Successors Are Appointed

Day 9: From Readiness Gaps to Successor Moves

- Targeted Development Actions — Closing Named Gaps for Each Successor
- Successor Feedback Conversations — Sharing Ratings Honestly and Constructively
- Interim Appointment Protocols — Activating Emergency Cover Without Confusion
- Transition Support for Appointed Successors — Easing Handover and Early Months
- Sector Cases in Utilities and Banking — Contrasting Technical and Regulated Slates

Day 10: Practising the Critical Role Succession Slate Pack

- Critical Role Selection Exercise — Applying Day Two Criteria to a Case
- Readiness Rating Simulation — Applying Day Six Evidence Weighting Rules
- Mock Calibration Session — Applying Day Seven Facilitation and Bias Interrupters
- Executive Briefing Rehearsal — Presenting Day Eight Metrics Under Challenge
- Critical Role Succession Slate Pack — Completing Slates, Evidence and Actions

Applying Succession Slate and Readiness Assessment After the Course

- Rebuild the critical role register with one business head using the criticality criteria and flag roles lacking emergency cover.
- Run one calibration session with a readiness evidence pack template and a decision log, then compare ratings against previous nominations.

Succession Slate and Readiness Assessment Questions FAQ

What is succession slate and readiness assessment and why does it matter now?

Succession slate and readiness assessment is the evidence-based practice of naming successors for critical roles and judging when each could step in. It matters now because boards expect defensible continuity cover rather than informal names on an organisation chart.

Which roles gain most from succession slate and readiness assessment training?

Succession slate and readiness assessment training suits HR business partners, talent specialists, calibration facilitators and people analysts. You gain most when these colleagues attend together and agree one evidence standard for every slate they prepare.

How does succession slate and readiness assessment differ from a high-potential development course?

Succession slate and readiness assessment equips the HR professionals who build and defend slates for critical roles. A high-potential development course focuses on the emerging leaders themselves and their personal growth, whereas this subject covers role criticality, readiness evidence, calibration and executive reporting.

What do you bring back from succession slate and readiness assessment training?

You bring back a slate pack for selected critical roles, holding success profiles, readiness ratings with evidence, calibration decision logs, coverage metrics and targeted development actions for each named successor.

Succession Slate and Readiness Assessment: The Way Forward

The critical role succession slate pack first informs which positions lack a ready-now successor and need urgent action. HR business partners, business heads and executive committees use it to agree appointments and development priorities. After its first calibration cycle, revisit the evidence weighting rules and the slate hit rate, since real appointment outcomes show where readiness ratings proved too generous or too cautious.