

How to use a skills matrix for *succession planning*

Succession planning fails when it runs on gut feel and a name scribbled against a role. A skills matrix turns it into evidence: who is genuinely ready for each critical role, who is a year away, and where you have no one at all. This is how to build a succession plan you can actually defend.



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Reading time 12 min • **Method** Upleashed 0 to 5 capability framework • **Updated** May 2026

THE SHORT ANSWER

To use a skills matrix for succession planning, identify your critical roles, define the key skills and level each one needs, then read the matrix to see who already meets that bar (ready now), who is one level away (ready soon), and where no one is close (exposed). Track bench strength per role, fix the concentration risks, and develop successors against the gaps. In short: **let the matrix tell you who can step up, who needs a year, and where you are dangerously thin.**

KEY TAKEAWAYS

- **Succession is about readiness, not names.** The question is not "who is next" but "who can genuinely do the role, and how soon".
- **The matrix is the evidence base.** Readiness is read from real, scored capability, not a manager's hunch about potential.
- **Band readiness simply.** Ready now, ready soon (about a year), ready later, or no successor at all.
- **Watch bench strength.** A critical role with one possible successor, or none, is a business risk, not a plan.
- **Beware concentration.** If your one ready successor covers several roles, you have a single point of failure dressed as a pipeline.

— START HERE

What succession planning *really asks*

Succession planning is the discipline of making sure you have people ready to step into critical roles when they fall vacant, by choice or by surprise. Done properly it is not a list of heirs apparent; it is an evidence-based read of who can genuinely do each role, and how soon.

Readiness, not names

The weak version of succession planning writes a name next to each senior role and calls it a plan. The strong version asks a harder question: **is that person actually ready, and if not, how far away are they?** Readiness is the real currency. A name with no capability behind it is a comfort blanket; a clear-eyed view of who could step up now, who needs a year of development, and who is years off is a plan you can act on and defend.

The skills matrix is the evidence

This is where a skills matrix changes everything. Instead of guessing who "has potential", you read readiness straight from scored capability: does this person already meet the level the role requires, on the skills that matter? The matrix turns succession from **a subjective conversation into an evidenced one**, grounded in what people have actually demonstrated. It is the same grid you use for gaps and development, now read against the requirements of critical roles rather than current ones.

It is risk management as much as talent management

Succession planning is often filed under talent development, but at heart it is risk management. A critical role with no ready successor is a live business risk, one resignation from disruption. Reading the matrix for succession surfaces exactly those risks: the roles resting on a single person, the skills only one expert holds, the pipelines that look full but all trace back to the same name. **Seeing the risk is the first step to removing it**, and the matrix makes it visible.

— WHY IT MATTERS NOW

The empty chair is a risk you can *see coming*

Critical roles fall vacant whether or not you are ready. The only choice is whether you saw it coming. With skills changing fast and reliable capability data rare, succession planning grounded in a matrix is how you turn an inevitable event into a managed one.

8%

GARTNER, 2024

of organisations have reliable data on their workforce's skills, so most plan succession on impressions, not evidence.

39%

WEF, 2025

of workers' core skills are expected to change by 2030, so the requirements of critical roles keep moving too.

63%

WEF, 2025

of employers call skills gaps the biggest barrier to transformation, and unfilled critical roles are the sharpest gaps of all.

The pattern is familiar by now: capability is shifting fast, the roles you are planning succession for are themselves changing, and most organisations lack the reliable data to see any of it clearly. That is how teams are caught out, a key person leaves and the scramble begins, because the "plan" was a name with nothing behind it. A skills matrix replaces that fragility with foresight. It shows you, today, **which critical roles are covered and which are exposed**, with enough warning to develop or recruit before the chair is empty, not after.

Seven steps to plan succession with a matrix

This turns succession from an annual guessing exercise into a read of the evidence. Work through it in order: define the critical roles and what they need, read readiness from the matrix, then act on the risks.

1

Identify the critical roles

Start narrow. Succession planning is for roles where a sudden vacancy would genuinely hurt, leadership, specialist, regulated or single-point-of-failure positions, not every job. List those critical roles first. Trying to plan succession for everyone at once dilutes the effort and buries the roles that actually carry risk under a mass of ones that do not.

WATCH OUT Planning succession for every role equally wastes effort. Concentrate on the handful where an empty chair is a real problem.

2

Define what each critical role requires

For each critical role, name the key skills it depends on and the level required for each, usually Level 4, an expert who can lead and train, for a senior or specialist role. This is the bar a successor must clear. Being explicit about the required level is what lets you measure readiness objectively rather than debating who "feels" ready.

WATCH OUT A role defined only by its title cannot be succeeded objectively. Define it by the skills and levels it actually requires.

3

Read readiness from the matrix

Now lay your people's scored capability against each role's requirement. Someone already at the required level is **ready now**; one level below on the key skills is **ready soon**, perhaps a year of development away; two or more below is **ready later**; and where no one is close, the role has **no successor**. This is succession planning read directly from evidence.

WATCH OUT Do not confuse current performance with readiness for a different role. Read against the target role's requirements, not the person's present job.

4

Measure bench strength per role

For each critical role, count how many people are realistically ready now or soon, its bench strength. A widely used rule of thumb is to aim for around three credible successors per critical role, giving you cover if one leaves or is unavailable. A role with one possible successor, or none, is flagged immediately as a risk that needs action, not reassurance.

WATCH OUT One successor is not a bench, it is a coincidence. Until a critical role has real depth behind it, treat it as exposed.

5

Spot the concentration and silo risks

Look across the whole picture, not just role by role. Two traps hide there: **concentration**, where your one ready successor is the successor for several roles at once, so a single departure empties multiple benches; and the **silo**, where all your ready people sit in one area while another has none. The matrix makes both visible in a way a role-by-role list never does.

WATCH OUT A pipeline that all traces back to one name is a single point of failure in disguise. Spread the readiness, do not just count it.

6

Develop successors against the gap

Readiness is not fixed; it is the thing you develop. For each "ready soon" successor, the matrix shows exactly which skills, and which levels, stand between them and the role, so development is targeted rather than generic. For exposed roles with no successor, the same view tells you whether to grow someone over time or recruit, and how urgently.

WATCH OUT A succession plan with no development attached is just a forecast. The value is in closing the gaps it reveals, deliberately.

7

Review it as a living plan

People develop, leave and change roles, so succession is never finished. Re-read the matrix on a regular cycle, and whenever a critical role or its holder changes, so readiness reflects today. A plan reviewed once a year and filed away is already out of date; one kept live alongside the matrix is a continuous, dependable view of where you stand.

WATCH OUT A static succession document dates fast. Tie it to the live matrix so it updates as capability and roles move.

— THE CORE IDEA

The readiness bands

Succession planning with a matrix comes down to placing each potential successor in a readiness band, derived from how their capability compares to the role's requirement. Three bands, plus the case where there is no one, tell you everything.

BAND 01

Ready now

Already meets the role's required level on the key skills. Could step up with little or no further development. These are your genuine successors, and the matrix proves it.

BAND 02

Ready soon

One level below the requirement on the key skills, roughly a year of focused development away. Your developing bench, and the matrix shows exactly what they need.

BAND 03

Ready later, or not at all

Two or more levels below, a longer-term prospect, or no one close at all. An exposed role: a clear signal to develop

deliberately or recruit ahead of need.

The power of the bands is that they convert a vague sense of "we'd probably be alright" into a precise, defensible read. Each band carries a different action: ready-now successors need retaining and stretching; ready-soon successors need targeted development against the specific gap; exposed roles need a deliberate plan, grow or hire, started early. Because the bands come straight from scored capability, the whole succession picture rests on **evidence rather than opinion**, which is exactly what makes it defensible when it matters.

— THE SCALE BEHIND THE SCORES

The 0 to 5 capability framework

Readiness is measured against a role's required level, so it needs a clear, shared scale. This fixed framework, developed by Dr Alex J. Martin-Smith, provides it, and its top level is built for succession: Level 5 flags the strategic, leadership capability that critical roles so often need.

0

No skill required or desired

EXCLUDED

No expectation that the person or role needs this skill within the next year. Take a longer-term view here, and do not use this level for short-term assessments. A 0 drops the skill out of that person's score entirely.

1

In training / Trainee

WEIGHTING 25%

Expected to be proficient within a year. Has completed up to 75% of training and does not yet fully understand the quality requirements. Generally a ready-later prospect for a role needing this skill.

2

Developing capabilities

WEIGHTING 50%

Has completed more than 75% of training. Can probably perform the task alone, but consistent quality and productivity are not yet evidenced, so complex output still needs checking or verification.

3

Capable

WEIGHTING 75%

Has completed 100% of training and shown consistent quality and productivity. Can work unsupervised. For a role requiring Level 4, a capable person here is typically a ready-soon successor.

4

Subject Matter Expert / Trainer

WEIGHTING 100% · USUAL ROLE BAR

Prolonged experience at a consistent level. Works autonomously and can train others, the level many critical roles require, so a Level 4 on the key skills is usually ready now. If unused for three months, drop to Level 3 to reconfirm.

5

Strategic ownership / Leadership

100% · THE SUCCESSION FLAG

Can define and develop new processes and skill requirements, show cross-function expertise, and demonstrate leadership. The purple flag is built for succession planning: it marks the people with the strategic capability that critical and leadership roles depend on.

How readiness reads off the scale

A critical role sets a required level for its key skills, usually Level 4. A successor's readiness is simply how their score compares: at the level is ready now, one below is ready soon, two or more below is ready later. Level 5's strategic flag, carrying the same 100% weight as Level 4, is what highlights the people ready not just to do a senior role but to lead it.

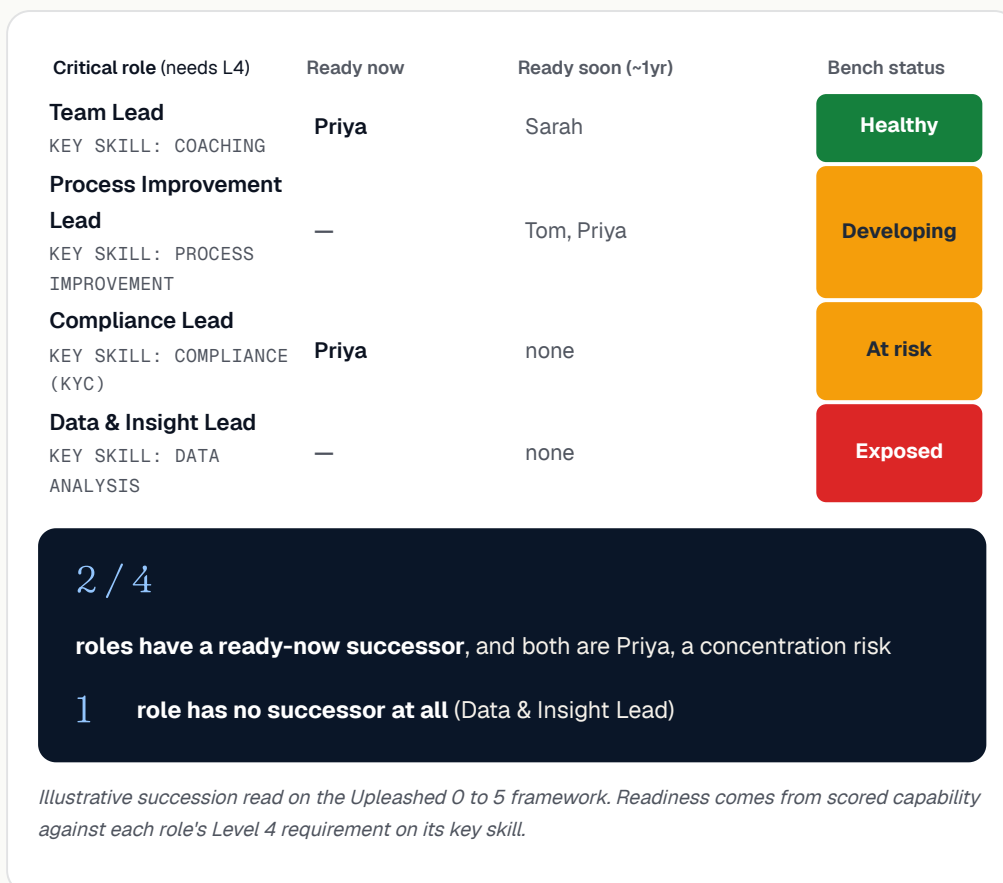
A worked example. Readiness for a Compliance Lead role, which requires Compliance (KYC) at Level 4:

KYC scores Sarah 2, Mark 1, Priya 4, James 1, Aisha 1, Tom 2
at Level 4 (ready now) → **Priya only** · at Level 3 (ready soon) → **nobody**
bench strength = **1**, well below the three you would want for a critical role.

— SEE IT ON A REAL TEAM

A succession plan, *read from the matrix*

Here is succession planning as the matrix delivers it. For four critical roles in a team, each requiring an expert (Level 4) on its key skill, the scored capability tells us exactly who is ready now, who is ready soon, and where the bench is empty.



WHAT THIS SUCCESSION PICTURE REVEALS

- **One role is genuinely healthy.** Team Lead has Priya ready now and Sarah about a year away, real depth, so a vacancy there could be covered from within without drama.
- **A dangerous concentration.** Priya is the only ready-now successor for both Team Lead and Compliance Lead. If she leaves or is promoted, two critical roles lose their bench at once, a single point of failure hiding inside the plan.
- **One role is fully exposed.** Data & Insight Lead has nobody ready now or soon, mirroring the team's known Data analysis gap. This is a recruit-or-develop-now decision, not a someday one.
- **The plan writes itself.** Build a second Compliance successor, accelerate the Process Improvement pair, and act on the Data role early. The matrix turned four roles into a clear, ranked set of actions.

WHAT THE MATRIX EXPOSES

Five succession risks a matrix reveals

A name-based plan hides its weaknesses; a matrix-based one exposes them. These are the five risks the evidence surfaces, each invisible on a simple list of heirs apparent.

Risk	What it looks like	The fix
No successor	A critical role with no one ready now or soon	Develop a successor deliberately, or recruit ahead of need
Single successor	A role resting on exactly one ready person, no depth	Build bench strength towards around three credible successors
Concentration	One person is the successor for several roles at once	Spread readiness so a single departure does not empty several benches
Heir-apparent bias	A favoured name assumed ready with no capability evidence behind it	Test the assumption against scored capability, not reputation
Hollow middle	Plenty of experts and juniors, but no one in the ready-soon band	Develop mid-level people now to fill the looming gap before it opens

Every one of these is the kind of risk that stays comfortably hidden until the day a critical role falls vacant, at which point it becomes an emergency. Reading succession from a skills matrix drags them into view while there is still time to act: a thin bench can be deepened, a concentration spread, an untested heir apparent checked against the evidence. The matrix does not make the decisions for you, but it makes sure you are making them with your eyes open.

— AVOID THESE

Six mistakes in succession planning

MISTAKE 01

Naming heirs, not assessing readiness

A name against a role is not a plan. Test whether the person genuinely meets the role's requirements, with evidence.

MISTAKE 02

Planning for every role

Succession effort spread across all roles dilutes the ones that matter. Concentrate on the genuinely critical few.

MISTAKE 03

Mistaking one successor for a bench

A single ready person is not depth. Until a critical role has several credible successors, treat it as exposed.

MISTAKE 04

Missing the concentration risk

If your one ready name covers several roles, a single exit empties multiple benches. Read across roles, not just down them.

MISTAKE 05

A plan with no development

Readiness is built, not found. A succession plan with no development attached is only a forecast of who you lack.

MISTAKE 06

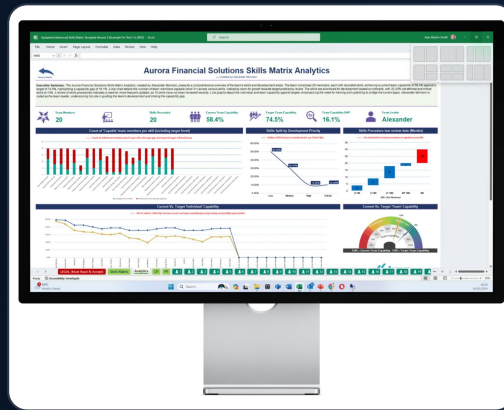
Reviewing it once a year

People and roles move constantly. A succession plan kept live against the matrix beats one filed and forgotten.

FROM HUNCH TO EVIDENCE

The method is free. A ready-made matrix just makes readiness *visible*.

Everything here works in a blank spreadsheet, and that is a fine place to start. A purpose-built template simply surfaces succession from the data you already hold. Score capability on the 0 to 5 scale, set each critical role's required level, and the grid shows who meets it, who is one level away, and where the bench is empty, with the Level 5 flag highlighting your strategic successors automatically.



The Advanced Excel Skills Matrix shows capability against required levels at a glance, the basis for reading who is ready now, ready soon, or missing, all on the same 0 to 5 framework used throughout this guide.

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Quick *answers*

Q How does a skills matrix help with succession planning?

It replaces guesswork with evidence. By scoring capability against the level each critical role requires, the matrix shows who is genuinely ready now, who is about a year away, and where you have no successor at all, so succession decisions rest on demonstrated capability rather than reputation or hunch.

Q What are succession readiness bands?

Simple categories for how prepared a potential successor is: ready now (already meets the role's required level), ready soon (about a year of development away, typically one level below), ready later (two or more levels below), or no successor at all. The bands come straight from scored capability.

Q What is bench strength?

It is how many credible successors a critical role has, a measure of depth and risk. A common rule of thumb is to aim for around three ready or near-ready successors per critical role, so a single departure does not leave you exposed. One successor, or none, is a risk flag, not a plan.

Q What is concentration risk in succession planning?

It is when your one ready successor is the named successor for several critical roles at once. The pipeline looks full, but it all traces back to one person, so a single departure empties multiple benches simultaneously. A matrix reveals it by letting you read readiness across roles, not just within them.

Q Which roles should I succession plan for?

The critical ones: roles where a sudden vacancy would genuinely hurt, leadership, specialist, regulated or single-point-of-failure positions. Trying to plan succession for every role at once dilutes the effort; concentrate on the handful that actually carry business risk.

Q Do I need special software for succession planning?

No. A well-kept skills matrix with required levels per critical role lets you read readiness and bench strength perfectly well, and most teams should start there. Software helps when you want succession tracked live across many roles and teams, with readiness and risks updating automatically.

ABOUT THE AUTHOR



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Alex is the creator of the Upleashed capability framework that powers Skills Matrix Template, the award-winning Excel skills matrix. A Chartered Manager with an MBA, an LLM and a doctorate in business administration, he has spent more than two decades helping operations, HR and quality teams turn capability from a gut feel into something they can measure, manage and prove.

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A stylized, handwritten signature in black ink that reads 'Alex J. Martin-Smith'.

Dr Alex J. Martin-Smith

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Know who can *step up*.

You now have the whole method. The quickest way to start is to list your critical roles this week, set the level each one needs, and read your matrix for who is ready now, ready soon, or missing. The empty chairs you can see coming are the ones you can still do something about.

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