HR DELIVERY
Making Sure HR Delivers

D7 / TALENT DEVELOPMENT

Succession Planning / Working Records

104 matched forms for the Discover, Diagnose, Design, Deliver and Review practitioner toolkit.



MATCHED TO THE D7 PRACTITIONER TOOLKIT

Use each numbered procedure before completing its record. Keep role versions, candidate agency, evidence confidence, cover, action owner and review date visible.

D7 WORKING RECORDS / OCTOBER 2026

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Find the matching record.

Each form has the same identifier as its practitioner tool. Use the return-to-contents footer.

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21 records

BEFORE YOU WRITE

Use only authorised evidence. A blank field is better than an invented result.

01 / DISCOVER

Discover Working Records

What critical work must continue under plausible futures, and who owns the succession decision?



Approved strategic scope, role and position baseline, criticality and exposure evidence, immediate continuity actions.

D7-D01 / REUSABLE WORKING RECORD

Governance charter

Define the authority, scope and annual decision rhythm before names are discussed.

USE WITH THE MATCHED PRACTITIONER TOOL

Strategy; sponsor mandate; governance policy; decision-rights register.

Scope

Exclusions

Horizon

Sponsor

Decision rights

Conflict route

Data access

Cadence

EVIDENCE / VERSION / REVIEWER

D7-D02 / REUSABLE WORKING RECORD

Ethics, fairness and data charter

Convert fairness, privacy and employee choice into operational controls.

USE WITH THE MATCHED PRACTITIONER TOOL

Local policy; privacy advice; assessment standards; participant journey.

Purpose

Allowed data

Notice

Access roles

Retention

Fairness check

Correction owner

EVIDENCE / VERSION / REVIEWER

D7-D03 / REUSABLE WORKING RECORD

Annual succession cycle planner

Schedule the whole cycle so evidence and action do not stop at the talent meeting.

USE WITH THE MATCHED PRACTITIONER TOOL

Governance charter; business cycle; workforce planning dates.

Cycle milestone

Owner

Inputs

Decision

Due date

Trigger

Status

EVIDENCE / VERSION / REVIEWER

D7-D04 / REUSABLE WORKING RECORD

Process maturity baseline

Establish how well the existing succession process works before designing a larger one.

USE WITH THE MATCHED PRACTITIONER TOOL

DIR-2.0 interview, focus-group, survey or large-group evidence; process records.

Dimension

Observed practice

Source

Confidence

Gap

Owner

Next check

EVIDENCE / VERSION / REVIEWER

D7-D05 / REUSABLE WORKING RECORD

Strategy-to-succession canvas

Translate strategy into succession questions about work and capability.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved strategy; workforce plan; operating model; leadership interviews.

Strategic outcome

Scenario

Capability shift

Affected work

Evidence

Owner

EVIDENCE / VERSION / REVIEWER

D7-D06 / REUSABLE WORKING RECORD

Strategic scenario scan

Test critical-work assumptions under more than one plausible future.

USE WITH THE MATCHED PRACTITIONER TOOL

Strategic plan; project pipeline; workforce model; approved scenarios.

Scenario

Assumption

Affected work

Capability need

Trigger

Robust response

EVIDENCE / VERSION / REVIEWER

D7-D07 / REUSABLE WORKING RECORD

Future capability map

Identify capabilities whose absence would impair future delivery.

USE WITH THE MATCHED PRACTITIONER TOOL

Strategy; capability architecture; role taxonomy; approved skills directory.

Outcome

Capability

Level

Current supply

Future demand

Concentration

Evidence

EVIDENCE / VERSION / REVIEWER

D7-D08 / REUSABLE WORKING RECORD

Executive stakeholder interview

Elicit executive risk and future-work evidence consistently.

USE WITH THE MATCHED PRACTITIONER TOOL

Executive interviews; service incidents; strategy and risk records.

Sponsor

Question

Evidence example

Future change

Disagreement

Follow-up

EVIDENCE / VERSION / REVIEWER

D7-D09 / REUSABLE WORKING RECORD

Role and position inventory

Create a complete role and position baseline before scoring.

USE WITH THE MATCHED PRACTITIONER TOOL

HRIS; approved architecture; position control; organisation chart.

Role ID	**Position ID**
Entity	**Family**
Grade	**Incumbent status**
Authority	**Source date**

EVIDENCE / VERSION / REVIEWER

D7-D10 / REUSABLE WORKING RECORD

Critical role scorecard

Rate structural role criticality independently of the current person.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved RCI method; role profile; service and risk evidence; rater notes.

Role

Criteria

Weights

Ratings

RCI

Tier

Override

Approval

EVIDENCE / VERSION / REVIEWER

D7-D11 / REUSABLE WORKING RECORD

Vacancy exposure assessment

Assess current vacancy exposure separately from criticality.

USE WITH THE MATCHED PRACTITIONER TOOL

Position status; tested cover; successor evidence; knowledge-transfer record.

Role

Horizon

Exposure evidence

Cover

Successor depth

VEI

Mitigation

Review

EVIDENCE / VERSION / REVIEWER

D7-D12 / REUSABLE WORKING RECORD

Criticality and coverage heatmap

Show criticality and exposure as two visible axes.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved RCI; VEI; cover test; successor-role portfolio.

Role

Criticality

Exposure

Quadrant

Cover

Concentration

Action

EVIDENCE / VERSION / REVIEWER

D7-D13 / REUSABLE WORKING RECORD

Criticality override decision log

Govern exceptions to the standard criticality method.

USE WITH THE MATCHED PRACTITIONER TOOL

Scorecard; delegated authority; incident or risk record; approval policy.

Role

Proposed exception

Evidence

Reviewer

Decision

Expiry

Trigger

EVIDENCE / VERSION / REVIEWER

D7-D14 / REUSABLE WORKING RECORD

Essential-work dependency map

Expose single-person and single-system dependencies in critical work.

USE WITH THE MATCHED PRACTITIONER TOOL

Process map; authority matrix; incident lessons; knowledge records.

Work outcome

Dependency

Alternate

Test status

Failure mode

Owner

EVIDENCE / VERSION / REVIEWER

D7-D15 / REUSABLE WORKING RECORD

Six-month absence scenario

Test the practical consequence of a key role being empty for six months.

USE WITH THE MATCHED PRACTITIONER TOOL

Service standards; risk register; cover arrangements; role authority.

Role

Six-month scenario

Affected work

Cover test

Impact

Recovery action

EVIDENCE / VERSION / REVIEWER

D7-D16 / REUSABLE WORKING RECORD

Section and career-family scope

Choose a proportionate scope across sections and career families.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved taxonomy; role inventory; strategic capability map.

Section

Family

Roles reviewed

Exclusions

Evidence gap

Reviewer

EVIDENCE / VERSION / REVIEWER

D7-D17 / REUSABLE WORKING RECORD

Authority and licence map

Identify duties or credentials that only authorised people can perform.

USE WITH THE MATCHED PRACTITIONER TOOL

Role profile; delegation policy; licence or certification register.

Authority

Source

Holder

Alternate

Validity

Gap

Escalation

EVIDENCE / VERSION / REVIEWER

D7-D18 / REUSABLE WORKING RECORD

Emergency cover baseline

Record what protection exists today before promising future readiness.

USE WITH THE MATCHED PRACTITIONER TOOL

Emergency plan; delegation records; workload; prior cover tests.

Role

Cover person or option

Authority

Capacity

Last test

Gap

Action

EVIDENCE / VERSION / REVIEWER

D7-D19 / REUSABLE WORKING RECORD

Critical-role confidence review

State how confident the panel is in each critical-role decision.

USE WITH THE MATCHED PRACTITIONER TOOL

Scorecards; interviews; risk records; diagnostic evidence.

Role

Judgement

Sources

Missing evidence

Confidence

Dissent

Expiry

EVIDENCE / VERSION / REVIEWER

D7-D20 / REUSABLE WORKING RECORD

Succession commission gate

Close discovery only when the programme has a defensible remit.

USE WITH THE MATCHED PRACTITIONER TOOL

Charter; role inventory; criticality review; ethics controls.

Scope

Approved method

Source gaps

Exceptions

Action owner

Approval

EVIDENCE / VERSION / REVIEWER

02 / DIAGNOSE

Diagnose Working Records

What will the future role require, what do candidate and programme evidence actually support, and where is it missing?



Versioned future profiles, separate candidate evidence, hard gates, aspiration, availability and uncertainty.

D7-G01 / REUSABLE WORKING RECORD

Future role success profile

Specify future contribution before comparing people.

USE WITH THE MATCHED PRACTITIONER TOOL

Strategy; approved architecture; work cases; role owner.

Role

Scenario

Outcomes

Essential requirements

Evidence anchors

Version

Approver

EVIDENCE / VERSION / REVIEWER

D7-G02 / REUSABLE WORKING RECORD

Outcome-to-capability decomposition

Break role outcomes into capabilities that can be evidenced and developed.

USE WITH THE MATCHED PRACTITIONER TOOL

Future role profile; job architecture; work samples; subject expert review.

Outcome

Tasks

Capability

Required level

Gate

Evidence

Reviewer

EVIDENCE / VERSION / REVIEWER

D7-G03 / REUSABLE WORKING RECORD

Proficiency anchor builder

Create observable rating anchors for the target role.

USE WITH THE MATCHED PRACTITIONER TOOL

Role cases; approved competency directory; assessor review.

Capability

Level

Behaviour example

Work context

Reviewer

Version

EVIDENCE / VERSION / REVIEWER

D7-G04 / REUSABLE WORKING RECORD

Role evidence and assessment blueprint

Plan what evidence can support each role requirement.

USE WITH THE MATCHED PRACTITIONER TOOL

Future role profile; assessment standards; existing work records.

Requirement

Method

Source

Assessor

Quality limit

Accommodation

Approval

EVIDENCE / VERSION / REVIEWER

D7-G05 / REUSABLE WORKING RECORD

Enterprise talent discovery map

Find talent options across functions and career families.

USE WITH THE MATCHED PRACTITIONER TOOL

HRIS; career family architecture; employee consent; manager evidence.

Pool

Role fit hypothesis

Source

Aspiration status

Evidence gap

Owner

EVIDENCE / VERSION / REVIEWER

D7-G06 / REUSABLE WORKING RECORD

Structured nomination evidence

Require nominations to cite role-relevant evidence.

USE WITH THE MATCHED PRACTITIONER TOOL

Manager records; role profile; assignment outcomes; employee view.

Nominee

Target role

Example

Date

Observer

Limitation

Aspiration

Reviewer

EVIDENCE / VERSION / REVIEWER

D7-G07 / REUSABLE WORKING RECORD

Career aspiration and mobility guide

Understand employee interest and mobility conditions before making a plan.

USE WITH THE MATCHED PRACTITIONER TOOL

Employee conversation; career plan; consent record.

Target opportunity

Aspiration

Mobility conditions

Support

Date

Permission

EVIDENCE / VERSION / REVIEWER

D7-G08 / REUSABLE WORKING RECORD

Slate quality and fairness audit

Check whether the emerging slate is fair and sufficiently broad.

USE WITH THE MATCHED PRACTITIONER TOOL

Eligibility records; nominations; assessment access; fairness policy.

Population

Slate

Access pattern

Concern

Corrective action

Reviewer

EVIDENCE / VERSION / REVIEWER

D7-G09 / REUSABLE WORKING RECORD

Internal and external supply options

Compare internal development, external sourcing and interim options honestly.

USE WITH THE MATCHED PRACTITIONER TOOL

Talent map; recruitment evidence; workforce plan; cover options.

Role

Option

Lead time

Constraint

Evidence

Owner

Fallback

EVIDENCE / VERSION / REVIEWER

D7-G10 / REUSABLE WORKING RECORD

Assessment battery planner

Build a proportionate battery of job-relevant evidence methods.

USE WITH THE MATCHED PRACTITIONER TOOL

Role evidence blueprint; assessment catalogue; assessor standards.

Requirement

Method

Assessor

Data class

Accommodation

Integration rule

EVIDENCE / VERSION / REVIEWER

D7-G11 / REUSABLE WORKING RECORD

Candidate evidence dossier

Collect a candidate's evidence in a traceable dossier.

USE WITH THE MATCHED PRACTITIONER TOOL

Work examples; qualifications; assessment records; candidate account.

Candidate

Target role

Profile version

Evidence

Source date

Conflict

Access

EVIDENCE / VERSION / REVIEWER

D7-G12 / REUSABLE WORKING RECORD

Successor-to-role fit and gap matrix

Compare evidence with each target-role requirement without hiding hard gaps.

USE WITH THE MATCHED PRACTITIONER TOOL

Future role profile; candidate dossier; approved criteria.

Requirement

Target

Evidence

Judgement

Confidence

Action

Owner

EVIDENCE / VERSION / REVIEWER

D7-G13 / REUSABLE WORKING RECORD

Evidence confidence rubric

Make confidence and uncertainty visible in each judgement.

USE WITH THE MATCHED PRACTITIONER TOOL

Candidate dossier; assessor notes; evidence-quality criteria.

Claim

Source quality

Date

Corroboration

Conflict

Confidence

Next test

EVIDENCE / VERSION / REVIEWER

D7-G14 / REUSABLE WORKING RECORD

Readiness rating guide

Express readiness as a conditional role-specific judgement.

USE WITH THE MATCHED PRACTITIONER TOOL

Role profile; fit matrix; candidate view; cover and availability records.

Candidate

Target role

Readiness

Conditions

Hard gaps

Confidence

Expiry

EVIDENCE / VERSION / REVIEWER

D7-G15 / REUSABLE WORKING RECORD

Assessor integration and feedback

Integrate multiple assessor views and give usable feedback.

USE WITH THE MATCHED PRACTITIONER TOOL

Assessment outputs; role anchors; assessor discussion; feedback policy.

Requirement

Findings

Disagreement

Agreed view

Candidate feedback

Correction

EVIDENCE / VERSION / REVIEWER

D7-G16 / REUSABLE WORKING RECORD

Future-role change comparison

Compare the current role with the future target role explicitly.

USE WITH THE MATCHED PRACTITIONER TOOL

Current job description; future profile; strategy scenario.

Current outcome

Future outcome

Change

Evidence

Development route

EVIDENCE / VERSION / REVIEWER

D7-G17 / REUSABLE WORKING RECORD

Essential qualification gate

Check non-negotiable credentials before readiness discussion.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved role profile; credential register; local professional rules.

Requirement	Holder
Issuer	Expiry
Jurisdiction	Verified status
Action	

EVIDENCE / VERSION / REVIEWER

D7-G18 / REUSABLE WORKING RECORD

Critical experience gap analysis

Identify experience that can only be gained through real work.

USE WITH THE MATCHED PRACTITIONER TOOL

Role profile; project history; manager and candidate account.

Experience demand

Current evidence

Gap

Assignment

Sponsor

Review

EVIDENCE / VERSION / REVIEWER

D7-G19 / REUSABLE WORKING RECORD

Scenario-specific role evidence

Check evidence against each plausible future scenario.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved scenarios; target-role profiles; candidate evidence.

Scenario

Requirement shift

Transferable evidence

Gap

Next test

EVIDENCE / VERSION / REVIEWER

D7-G20 / REUSABLE WORKING RECORD

Candidate capacity and availability check

Check whether a named person can actually cover the role when required.

USE WITH THE MATCHED PRACTITIONER TOOL

Candidate aspiration; line-manager release; portfolio matrix; workforce plan.

Candidate

Target role

Available date

Release condition

Competing role

Fallback

EVIDENCE / VERSION / REVIEWER

D7-G21 / REUSABLE WORKING RECORD

Diagnostic synthesis and limits

Bring role, candidate and programme evidence into one bounded decision.

USE WITH THE MATCHED PRACTITIONER TOOL

SPF outputs; DIR-2.0 findings; candidate dossiers; role profile.

Role

Criticality

Exposure

Options

Evidence limits

Cover

Decision

EVIDENCE / VERSION / REVIEWER

03 / DESIGN

Design Working Records

How will decisions be calibrated fairly, and what funded development and continuity response will reduce exposure?



Approved portfolio, conditional readiness decisions, cover and development plans, ownership and residual risk.

D7-S01 / REUSABLE WORKING RECORD

Calibration pre-read pack

Give calibration reviewers the same bounded evidence before discussion.

USE WITH THE MATCHED PRACTITIONER TOOL

Role profiles; candidate dossiers; risk register; access list.

Role

Decision

Profile

Candidate summary

Limitations

Reviewer

Deadline

EVIDENCE / VERSION / REVIEWER

D7-S02 / REUSABLE WORKING RECORD

Evidence-led calibration guide

Run a meeting that tests evidence before consensus.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved pre-read; role anchors; facilitator guide; conflict declarations.

Role

Evidence issue

Views

Resolution

Dissent

Decision

Action

EVIDENCE / VERSION / REVIEWER

D7-S03 / REUSABLE WORKING RECORD

Decision, condition and dissent log

Make uncertainty, conditions and dissent part of the formal record.

USE WITH THE MATCHED PRACTITIONER TOOL

Calibration notes; role profile; candidate evidence.

Decision

Condition

Source

Dissent

Owner

Expiry

Follow-up

EVIDENCE / VERSION / REVIEWER

D7-S04 / REUSABLE WORKING RECORD

Successor-role portfolio matrix

Show all successor-role links without counting people twice.

USE WITH THE MATCHED PRACTITIONER TOOL

Candidate-role records; role inventory; availability and mobility.

Role

Candidate

Readiness

Conditions

Link status

Conflict

Owner

EVIDENCE / VERSION / REVIEWER

D7-S05 / REUSABLE WORKING RECORD

Candidate concentration map

Find overreliance on a small number of candidates.

USE WITH THE MATCHED PRACTITIONER TOOL

Portfolio matrix; workforce plan; candidate availability.

Candidate

Role links

Simultaneous limit

Conflict

Action

Owner

EVIDENCE / VERSION / REVIEWER

D7-S06 / REUSABLE WORKING RECORD

Succession scenario stress test

Stress-test the plan against plausible disruption.

USE WITH THE MATCHED PRACTITIONER TOOL

Risk map; scenario assumptions; portfolio; cover tests.

Scenario

Affected roles

Available people

Failure point

Response

Residual risk

EVIDENCE / VERSION / REVIEWER

D7-S07 / REUSABLE WORKING RECORD

Successor development contract

Turn a readiness gap into a mutual, funded development agreement.

USE WITH THE MATCHED PRACTITIONER TOOL

Role fit matrix; candidate discussion; assignment options.

Gap

Assignment

Candidate consent

Sponsor

Resources

Evidence

Milestone

EVIDENCE / VERSION / REVIEWER

D7-S08 / REUSABLE WORKING RECORD

Critical experience assignment plan

Give each critical gap a real experience rather than a course label.

USE WITH THE MATCHED PRACTITIONER TOOL

Role requirements; assignment inventory; candidate capacity.

Experience gap

Assignment

Supervisor

Release

Milestone

Evidence

EVIDENCE / VERSION / REVIEWER

D7-S09 / REUSABLE WORKING RECORD

Emergency cover and knowledge transfer

Design emergency cover and knowledge transfer as separate capabilities.

USE WITH THE MATCHED PRACTITIONER TOOL

Continuity plan; delegation; knowledge map; cover availability.

Role

Immediate duties

Cover

Authority

Knowledge

Drill

Escalation

EVIDENCE / VERSION / REVIEWER

D7-S10 / REUSABLE WORKING RECORD

Build-buy-borrow-redesign-automate choice

Compare build, buy, borrow, redesign and automate options on the same decision basis.

USE WITH THE MATCHED PRACTITIONER TOOL

Workforce plan; market intelligence; role profile; budget.

Gap

Option

Lead time

Cost

Constraint

Chosen response

Fallback

EVIDENCE / VERSION / REVIEWER

D7-S11 / REUSABLE WORKING RECORD

Candidate and manager communication

Plan honest communication with candidates and managers.

USE WITH THE MATCHED PRACTITIONER TOOL

Privacy charter; employee notice; calibration outcome; development plan.

Audience

Message

Permission

Speaker

Timing

Feedback

Record

EVIDENCE / VERSION / REVIEWER

D7-S12 / REUSABLE WORKING RECORD

Succession sponsor guide

Secure sponsor action beyond endorsing a list.

USE WITH THE MATCHED PRACTITIONER TOOL

Critical-role map; development contracts; sponsor capacity.

Sponsor

Role

Commitment

Resource

Evidence

Due date

Escalation

EVIDENCE / VERSION / REVIEWER

D7-S13 / REUSABLE WORKING RECORD

Role-profile version control

Keep future-role definitions traceable through changes.

USE WITH THE MATCHED PRACTITIONER TOOL

Role architecture; strategy approval; calibration decisions.

Role ID	Version
Change	Effective date
Affected evidence	Reviewer

EVIDENCE / VERSION / REVIEWER

D7-S14 / REUSABLE WORKING RECORD

Assessment permission design

Design consent and access for sensitive assessment evidence.

USE WITH THE MATCHED PRACTITIONER TOOL

Assessment blueprint; privacy policy; provider terms.

Purpose

Method

Consent

Access

Retention

Feedback

Approval

EVIDENCE / VERSION / REVIEWER

D7-S15 / REUSABLE WORKING RECORD

Conflict and recusal route

Build recusal into the decision before a conflict arises.

USE WITH THE MATCHED PRACTITIONER TOOL

Governance charter; panel roster; nomination relationships.

Conflict

Person

Decision

Recusal

Alternate

Date

Reviewer

EVIDENCE / VERSION / REVIEWER

D7-S16 / REUSABLE WORKING RECORD

Development opportunity allocation

Allocate development opportunities using clear criteria.

USE WITH THE MATCHED PRACTITIONER TOOL

Assignment inventory; candidate pool; fairness review.

Opportunity

Criteria

Applicants

Decision

Accommodation

Exception

Outcome

EVIDENCE / VERSION / REVIEWER

D7-S17 / REUSABLE WORKING RECORD

Simultaneous vacancy response

Design a response when two vacancies occur together.

USE WITH THE MATCHED PRACTITIONER TOOL

Role portfolio; cover plans; scenario stress test.

Vacancy pair

Simultaneous capacity

Control gap

Primary

Fallback

Owner

EVIDENCE / VERSION / REVIEWER

D7-S18 / REUSABLE WORKING RECORD

Cross-function mobility conditions

Set conditions for cross-function moves before naming a destination.

USE WITH THE MATCHED PRACTITIONER TOOL

Role profile; career pathway; mobility policy; employee view.

Origin

Target

Gap

Mobility condition

Release

Bridge

Choice

EVIDENCE / VERSION / REVIEWER

D7-S19 / REUSABLE WORKING RECORD

External contingency design

Preserve an external option where internal readiness cannot close risk in time.

USE WITH THE MATCHED PRACTITIONER TOOL

Market evidence; recruitment process; risk register; budget.

Role

Gap

Market source

Lead time

Trigger

Interim

Owner

EVIDENCE / VERSION / REVIEWER

D7-S20 / REUSABLE WORKING RECORD

Knowledge transfer architecture

Arrange transfer of know-how that a job description does not capture.

USE WITH THE MATCHED PRACTITIONER TOOL

Incident history; process records; incumbent and alternate interviews.

Knowledge item	**Owner**
Transfer method	**Test**
Evidence	**Date**

EVIDENCE / VERSION / REVIEWER

D7-S21 / REUSABLE WORKING RECORD

Succession plan approval gate

Approve a plan that funds action and discloses residual risk.

USE WITH THE MATCHED PRACTITIONER TOOL

SPF records; calibration log; funding decisions; risk register.

Plan version

Approved actions

Residual risk

Funding

Approver

Review

EVIDENCE / VERSION / REVIEWER

04 / DELIVER

Deliver Working Records

Are candidates getting real work experiences and is immediate cover tested rather than assumed?



Live assignments, feedback, consent, sponsor release, cover drills and milestone evidence.

D7-L01 / REUSABLE WORKING RECORD

Programme launch conversation

Start the approved succession cycle with a shared understanding of work and boundaries.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved charter; critical-work map; communication plan.

Audience

Message

Decisions

Questions

Owner

Due date

EVIDENCE / VERSION / REVIEWER

D7-L02 / REUSABLE WORKING RECORD

Candidate consent confirmation

Confirm a candidate knows and accepts the specific evidence route.

USE WITH THE MATCHED PRACTITIONER TOOL

Participant notice; assessment plan; local privacy advice.

Candidate

Purpose

Method

Choice

Accommodation

Permission date

Next step

EVIDENCE / VERSION / REVIEWER

D7-L03 / REUSABLE WORKING RECORD

Manager release briefing

Help line managers release candidates for real developmental work.

USE WITH THE MATCHED PRACTITIONER TOOL

Development contract; workload plan; sponsor approval.

Candidate

Assignment

Release hours

Cover

Manager

Start

Escalation

EVIDENCE / VERSION / REVIEWER

D7-L04 / REUSABLE WORKING RECORD

Structured evidence collection

Collect comparable work evidence against the approved profile.

USE WITH THE MATCHED PRACTITIONER TOOL

Role profile; work records; assessor guide.

Requirement

Episode

Action

Result

Observer

Date

Limitation

EVIDENCE / VERSION / REVIEWER

D7-L05 / REUSABLE WORKING RECORD

Assessment scheduling and accommodation

Deliver assessments with consistent access and qualified oversight.

USE WITH THE MATCHED PRACTITIONER TOOL

Assessment blueprint; participant needs; assessor roster.

Method

Date

Assessor

Accommodation

Deviation

Feedback

Storage

EVIDENCE / VERSION / REVIEWER

D7-L06 / REUSABLE WORKING RECORD

Calibration meeting run sheet

Run the agreed calibration sequence with evidence in front of the panel.

USE WITH THE MATCHED PRACTITIONER TOOL

Calibration pre-read; conflict log; evidence dossiers.

Panel

Role

Gate

Evidence

Judgement

Dissent

Owner

EVIDENCE / VERSION / REVIEWER

D7-L07 / REUSABLE WORKING RECORD

Candidate feedback conversation

Give the candidate an honest, useful development account.

USE WITH THE MATCHED PRACTITIONER TOOL

Calibrated decision; candidate evidence; communication guide.

Strength

Gap

Evidence limit

Candidate view

Action

Review

EVIDENCE / VERSION / REVIEWER

D7-L08 / REUSABLE WORKING RECORD

Stretch assignment launch

Start a stretch assignment with safe scope and testable outcomes.

USE WITH THE MATCHED PRACTITIONER TOOL

Development contract; project brief; sponsor capacity.

Assignment

Target capability

Authority

Support

Milestone

Evidence

EVIDENCE / VERSION / REVIEWER

D7-L09 / REUSABLE WORKING RECORD

Acting-role trial

Use a time-bound acting trial to test role demands responsibly.

USE WITH THE MATCHED PRACTITIONER TOOL

Cover plan; delegation; role requirements; work outputs.

Acting scope

Dates

Authority

Observed work

Gap

Next action

EVIDENCE / VERSION / REVIEWER

D7-L10 / REUSABLE WORKING RECORD

Cross-function rotation

Build cross-function experience without losing the current role's obligations.

USE WITH THE MATCHED PRACTITIONER TOOL

Career plan; mobility policy; host project.

Origin

Host

Gap

Dates

Release

Output

Supervisor

Review

EVIDENCE / VERSION / REVIEWER

D7-L11 / REUSABLE WORKING RECORD

Mentor pairing for role knowledge

Pair a mentor to transfer judgement and opportunity with clear boundaries.

USE WITH THE MATCHED PRACTITIONER TOOL

Development contract; mentoring policy; mentor availability.

Gap

Mentor

Agreement

Experience

Work application

Review

EVIDENCE / VERSION / REVIEWER

D7-L12 / REUSABLE WORKING RECORD

Sponsor access commitment

Turn sponsor support into concrete access and decisions.

USE WITH THE MATCHED PRACTITIONER TOOL

Sponsor guide; assignment plan; business calendar.

Sponsor

Opportunity

Access

Boundary

Evidence

Date

EVIDENCE / VERSION / REVIEWER

D7-L13 / REUSABLE WORKING RECORD

Knowledge-transfer sprint

Transfer fragile knowledge in a short, tested cycle.

USE WITH THE MATCHED PRACTITIONER TOOL

Knowledge map; past cases; alternate authority.

Knowledge item

Case

Practice

Test

Gap

Owner

Date

EVIDENCE / VERSION / REVIEWER

D7-L14 / REUSABLE WORKING RECORD

Emergency cover drill

Test immediate cover before treating it as available.

USE WITH THE MATCHED PRACTITIONER TOOL

Emergency plan; delegation; service standards.

Scenario

Cover

Start time

Decisions

Failures

Corrections

Retest

EVIDENCE / VERSION / REVIEWER

D7-L15 / REUSABLE WORKING RECORD

External pipeline activation

Activate external supply only when the agreed trigger is met.

USE WITH THE MATCHED PRACTITIONER TOOL

External contingency; recruitment policy; role profile.

Trigger

Authorisation

Market channel

Lead time

Interim cover

Status

EVIDENCE / VERSION / REVIEWER

D7-L16 / REUSABLE WORKING RECORD

Portfolio deployment check

Reconcile role links with real simultaneous deployment capacity.

USE WITH THE MATCHED PRACTITIONER TOOL

Portfolio matrix; manager release; cover rota.

Candidate

Linked roles

Current capacity

Conflict

Decision

Fallback

EVIDENCE / VERSION / REVIEWER

D7-L17 / REUSABLE WORKING RECORD

Action-owner tracker

Keep approved succession actions owned and visible.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved plan; development contracts; risk register.

Action

Linked risk

Owner

Due

Resource

Evidence

Escalation

EVIDENCE / VERSION / REVIEWER

D7-L18 / REUSABLE WORKING RECORD

Development funding release

Release funding and time before a plan is represented as active.

USE WITH THE MATCHED PRACTITIONER TOOL

Budget; sponsor approval; manager capacity; action register.

Action

Cost

Release time

Approver

Condition

Status

Date

EVIDENCE / VERSION / REVIEWER

D7-L19 / REUSABLE WORKING RECORD

Accessible participation check

Make each assessment and opportunity accessible in practice.

USE WITH THE MATCHED PRACTITIONER TOOL

Participant view; accessibility policy; assignment distribution.

Opportunity

Barrier

Adjustment

Owner

Candidate feedback

Review

EVIDENCE / VERSION / REVIEWER

D7-L20 / REUSABLE WORKING RECORD

Candidate withdrawal response

Respond to a candidate's change of mind without concealing the portfolio risk.

USE WITH THE MATCHED PRACTITIONER TOOL

Candidate conversation; consent record; portfolio.

Candidate choice

Affected role

Risk change

Action

Owner

Date

EVIDENCE / VERSION / REVIEWER

D7-L21 / REUSABLE WORKING RECORD

Milestone evidence capture

Capture evidence at milestones rather than waiting for an annual meeting.

USE WITH THE MATCHED PRACTITIONER TOOL

Assignment plan; work outputs; feedback; target-role profile.

Milestone

Evidence

Source

Candidate reflection

Gap

Next action

EVIDENCE / VERSION / REVIEWER

05 / REVIEW

Review
Working Records

What changed in critical work, readiness, cover, fairness and action delivery, and what must be renewed?



Assurance, refreshed profiles and evidence, corrected actions, residual risk and next-cycle commission.

D7-R01 / REUSABLE WORKING RECORD

Annual succession assurance register

Give executives an honest annual account of succession exposure and action.

USE WITH THE MATCHED PRACTITIONER TOOL

Role register; portfolio; action log; risk reviews.

Period

Scope

Key risks

Coverage

Limitations

Decisions

Approver

EVIDENCE / VERSION / REVIEWER

D7-R02 / REUSABLE WORKING RECORD

Executive succession dashboard

Display a small set of measures without hiding uncertainty.

USE WITH THE MATCHED PRACTITIONER TOOL

Approved registers; candidate-role matrix; action history.

Measure

Numerator

Denominator

Date

Exception

Owner

EVIDENCE / VERSION / REVIEWER

D7-R03 / REUSABLE WORKING RECORD

Quarterly risk review pack

Revisit exposure and delivery on a quarterly cadence.

USE WITH THE MATCHED PRACTITIONER TOOL

Quarterly role updates; action register; cover tests.

Role

Change

Exposure

Action status

Decision

Owner

Next date

EVIDENCE / VERSION / REVIEWER

D7-R04 / REUSABLE WORKING RECORD

Appointment and transition outcome

Learn whether an actual appointment and transition worked.

USE WITH THE MATCHED PRACTITIONER TOOL

Appointment record; onboarding plan; work outcomes; participant account.

Role

Expected readiness

Transition evidence

Context

Learning

Action

EVIDENCE / VERSION / REVIEWER

D7-R05 / REUSABLE WORKING RECORD

Process maturity and validation

Test whether the succession process itself improved.

USE WITH THE MATCHED PRACTITIONER TOOL

DIR-2.0 data; governance records; interviews; prior baseline.

Dimension	Baseline
Current evidence	Method
Limitation	Action

EVIDENCE / VERSION / REVIEWER

D7-R06 / REUSABLE WORKING RECORD

Succession data audit and retention

Keep named succession data accurate, restricted and time-bounded.

USE WITH THE MATCHED PRACTITIONER TOOL

Privacy policy; access logs; data inventory; records schedule.

Record

Purpose

Holder

Access

Accuracy

Retention

Correction

EVIDENCE / VERSION / REVIEWER

D7-R07 / REUSABLE WORKING RECORD

Critical-role scope refresh

Refresh which work is critical as strategy changes.

USE WITH THE MATCHED PRACTITIONER TOOL

Strategy update; role inventory; criticality evidence.

Role

Prior tier

New work

Evidence

Decision

Effective date

EVIDENCE / VERSION / REVIEWER

D7-R08 / REUSABLE WORKING RECORD

Strategic scenario assumption refresh

Keep scenario assumptions visible and current.

USE WITH THE MATCHED PRACTITIONER TOOL

Strategy; workforce forecasts; approved scenario register.

Scenario

Assumption

Signal

Change

Affected role

Owner

EVIDENCE / VERSION / REVIEWER

D7-R09 / REUSABLE WORKING RECORD

Readiness evidence expiry check

Expire readiness when its evidence or role basis expires.

USE WITH THE MATCHED PRACTITIONER TOOL

Readiness log; credential register; role version history.

Candidate

Role

Old status

Changed evidence

New status

Owner

EVIDENCE / VERSION / REVIEWER

D7-R10 / REUSABLE WORKING RECORD

Aspiration reconfirmation

Reconfirm the person’s interest as opportunities become real.

USE WITH THE MATCHED PRACTITIONER TOOL

Candidate conversation; career plan; consent record.

Candidate

Role

Interest

Conditions

Date

Permission

Action

EVIDENCE / VERSION / REVIEWER

D7-R11 / REUSABLE WORKING RECORD

Vacancy exposure movement

Track whether vacancy risk has actually changed.

USE WITH THE MATCHED PRACTITIONER TOOL

Vacancy exposure record; cover tests; role changes.

Role

Prior VEI

Current evidence

Movement

Action

Review

EVIDENCE / VERSION / REVIEWER

D7-R12 / REUSABLE WORKING RECORD

Coverage depth audit

Review the depth of credible cover, not just whether a name exists.

USE WITH THE MATCHED PRACTITIONER TOOL

Portfolio; cover drills; readiness dossiers.

Role

Cover depth

Distinct options

Conditions

Gaps

Owner

EVIDENCE / VERSION / REVIEWER

D7-R13 / REUSABLE WORKING RECORD

Candidate concentration recheck

Recheck shared candidates after role and staffing changes.

USE WITH THE MATCHED PRACTITIONER TOOL

Successor-role portfolio; workload; mobility decisions.

Candidate

Links

Capacity

Scenario

Conflict

Mitigation

EVIDENCE / VERSION / REVIEWER

D7-R14 / REUSABLE WORKING RECORD

Development assignment outcome

Judge whether a development assignment produced relevant capability evidence.

USE WITH THE MATCHED PRACTITIONER TOOL

Assignment contract; work output; feedback; role profile.

Assignment

Planned gap

Actual work

Evidence

Remaining gap

Next step

EVIDENCE / VERSION / REVIEWER

D7-R15 / REUSABLE WORKING RECORD

Unsuccessful assignment learning

Learn from an assignment that did not produce the intended evidence.

USE WITH THE MATCHED PRACTITIONER TOOL

Assignment record; candidate and sponsor accounts; work context.

Intended experience

Blocker

Attribution

Alternative

Owner

Date

EVIDENCE / VERSION / REVIEWER

D7-R16 / REUSABLE WORKING RECORD

Fair-access and adverse-pattern review

Check who had access to nomination, evidence and development opportunities.

USE WITH THE MATCHED PRACTITIONER TOOL

Eligibility data; nominations; assignments; fairness policy.

Population

Access measure

Pattern

Cause

Correction

Reviewer

EVIDENCE / VERSION / REVIEWER

D7-R17 / REUSABLE WORKING RECORD

Successor experience review

Ask participants whether the process was clear and developmental.

USE WITH THE MATCHED PRACTITIONER TOOL

Participant feedback; communication records; service review.

Theme

Example

Affected step

Response

Owner

Review

EVIDENCE / VERSION / REVIEWER

D7-R18 / REUSABLE WORKING RECORD

Sponsor commitment review

Check whether sponsors delivered promised access and cover.

USE WITH THE MATCHED PRACTITIONER TOOL

Sponsor guide; budget; action register; candidate evidence.

Commitment

Owner

Due date

Delivered evidence

Effect

Escalation

EVIDENCE / VERSION / REVIEWER

D7-R19 / REUSABLE WORKING RECORD

Portfolio action closure

Close actions only with evidence and residual-risk review.

USE WITH THE MATCHED PRACTITIONER TOOL

Action register; cover test; assignment outcome; risk record.

Action

Intended effect

Evidence

Risk change

Closure

Next action

EVIDENCE / VERSION / REVIEWER

D7-R20 / REUSABLE WORKING RECORD

Board decision note

Give the board a decision paper with clear options and limits.

USE WITH THE MATCHED PRACTITIONER TOOL

Annual assurance; risk map; action proposals; governance charter.

Decision

Context

Options

Recommendation

Controls

Owner

Date

EVIDENCE / VERSION / REVIEWER

D7-R21 / REUSABLE WORKING RECORD

Next-cycle commission

Commission the next cycle using evidence from the one just completed.

USE WITH THE MATCHED PRACTITIONER TOOL

Annual review; diagnostic; strategy; action history.

Lesson

Change

Scope

Owner

Resource

Approval

Start

EVIDENCE / VERSION / REVIEWER

SOURCE AND BOUNDARY

Use the main toolkit.

These records accompany the D7 Succession Planning practitioner edition.

The main toolkit explains each numbered activity and includes a joined illustrative case. The SPF framework controls three practical outputs. The 99-page DIR-2.0 manual controls eight diagnostic dimensions and exact questions. The 277-page ebook preserves the S8 source model and forty-six original field tool identifiers.

These are reusable working records, not appointment decisions or validated potential scores. Keep role criticality, vacancy exposure, cover, aspiration, candidate evidence and conditional readiness separate. Restrict named data to authorised reviewers.