



Critical Role & Succession Heatmap

User Guide

What This Tool Is For

The Critical Role & Succession Heatmap helps you identify and manage workforce risk in your engineering and technical teams. It gives you visibility of where you're most vulnerable and helps you plan proactive actions before vacancies become crises.

When to Use This Tool

- **Annual workforce planning:** Review your engineering team's succession risks as part of your strategic planning cycle.
- **After major organizational changes:** Following restructures, acquisitions, or significant departures.
- **Before major projects or CAPEX investments:** Ensure you have the technical capability to deliver.
- **When you notice hiring challenges:** If vacancies are taking too long or you're struggling to attract candidates.

Who Should Complete This

This is a collaborative exercise. You'll get the best results with:

- **HR or People Lead:** Brings workforce planning perspective and understands internal development pathways.
- **Engineering or Operations Lead:** Knows the technical requirements, who performs critical functions, and business impact of each role.
- **Your recruitment partner (facilitating):** Adds market intelligence on replacement difficulty and external candidate availability.

What You'll Get Out of It

- A clear view of your most critical engineering roles and why they matter.
- Identification of succession gaps and single points of failure.
- A prioritized action plan with owners and deadlines.
- Confidence that you're proactively managing workforce risk, not just reacting to departures.



How to Run a 60-Minute Session with This Tool

Follow these five steps to complete the heatmap in a single focused session.

Step 1: List All Roles in Engineering and Technical Teams (10 mins)

Open the **1. Roles Overview** tab. List every distinct role in your engineering, technical, and specialist teams. Include:

- Design engineers, project engineers, maintenance engineers, controls specialists
- Technical managers and team leads
- Field service technicians, commissioning engineers, site-based specialists

Step 2: Score Business Impact and Vacancy Risk (15 mins)

For each role, score three dimensions on a 1-5 scale:

- **Business Impact (1=Low, 5=Critical):** What happens if this role is vacant? Does production stop? Do projects stall? Do you breach compliance?
- **Vacancy Risk (1=Low, 5=High):** How likely is this role to become vacant soon? Consider retirements, dissatisfaction, competitive threats, burnout.
- **Ease of Replacement (1=Easy, 5=Very Hard):** If this person left tomorrow, how hard would it be to replace them? Consider market availability, niche skills, internal bench.

Mark any **Single Points of Failure** (Y/N) — roles where only one person has the knowledge or capability. The **Priority Rating** will auto-calculate.

Step 3: Identify Critical Roles (5 mins)

Review the Priority Rating column. Focus on roles marked **CRITICAL** or **HIGH**. These are your most exposed positions and will be the focus of your succession planning.

Step 4: Map Internal Successors and Readiness (20 mins)

Move to the **2. Succession Heatmap** tab. For each critical role:

- **Identify 1-2 potential internal successors** — people who could step into this role with the right development.
- **Assess their readiness:** Now (ready immediately) | 1-2 years (needs development) | 3+ years (early-stage or big gap).
- **Flag if an external hire is likely needed** if internal successors are weak or non-existent.

Be honest. If there's no one ready, that's exactly what you need to know. Highlight the roles where you have **no succession coverage** — these are your highest-risk positions.

Step 5: Capture Top 5 Actions (10 mins)

Move to the **3. Actions & Owners** tab. For your highest-risk roles, agree concrete actions:



- **Training or development plans** for internal successors (e.g., shadowing, certifications, project exposure).
- **External hiring pipelines** for roles with no internal cover (e.g., start building talent pool now, even if not recruiting yet).
- **Knowledge transfer or documentation** for single points of failure.
- **Retention actions** for critical people showing signs of leaving.

Assign an owner, target date, and status for each action. Review quarterly to track progress.

Next Steps

Once you've completed your heatmap:

- Share the completed tool with your leadership team so workforce risk is visible.
- Schedule a quarterly review to update succession plans and track actions.
- Use this as the foundation for your 12-24 month engineering talent plan.

Not sure where to start, or want an experienced facilitator to run this session with your team?

Book a free 30-minute discovery call and we'll talk through your succession risks, identify your most exposed roles, and agree a practical next step.

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