

How to develop and implement a

Succession Planning and Management Program

Online Workshop



DATE & TIME

November 11 and 18, 2026
8:00 AM - 5:00 PM

PLATFORM

Zoom

Table of Contents

3	Executive Summary	8	Workshop Outline
4	Why Leadership Pipelines Matter Today	12	Facilitator's Profile
5	Learning Objectives	13	Learning Investment
6	About the Program	14	About ExeQserve
7	Target Participants		



Executive Summary

Organizations spend years developing talent, yet many find themselves unprepared when key leaders retire, resign, transfer, or are promoted. Critical positions remain vacant, leadership continuity is disrupted, and valuable institutional knowledge is lost.

The challenge is not simply replacing people. The challenge is building a sustainable pipeline of future leaders who are prepared to assume greater responsibilities as organizational needs evolve.

This highly practical and implementation-focused workshop provides participants with a proven methodology for developing and implementing a competency-based Succession Planning and Management Program. Participants will learn how to identify critical roles, build success profiles, assess talent, conduct talent reviews, develop successor pools, accelerate readiness, and establish governance mechanisms that ensure leadership continuity.

More importantly, participants will leave with a complete Succession Planning and Management Toolkit and a draft framework that can be immediately adapted and implemented within their organizations.



Why Leadership Pipelines Matter Today

Many organizations recognize the importance of succession planning but struggle to implement it effectively. Often, succession planning is reduced to identifying replacement candidates whenever a vacancy occurs. While replacement planning has its place, it does little to prepare future leaders for increasingly complex organizational challenges.

Effective succession planning begins long before positions become vacant. It requires organizations to systematically identify critical roles, assess future talent requirements, identify individuals with leadership potential, and provide meaningful developmental experiences that prepare them for greater responsibilities.

Organizations with strong leadership pipelines benefit from:

- Greater leadership continuity
- Reduced dependency on external hiring
- Stronger employee engagement and retention
- Better preservation of institutional knowledge
- Faster response to organizational growth opportunities
- Increased organizational resilience during transitions

For employees, succession planning creates visibility into career pathways and demonstrates the organization's commitment to talent development.

For Talent Development practitioners, succession planning provides an opportunity to demonstrate strategic value by directly contributing to organizational sustainability and future readiness.

Terminal Objective

By the end of the workshop, participants will be able to develop a competency-based Succession Planning and Management Program that identifies critical roles, builds talent pipelines, develops successor readiness, and supports leadership continuity within their organizations.

Enabling Objectives

At the end of the workshop, participants will be able to:

- 1.Explain the strategic importance of succession planning and management.
- 2.Differentiate succession planning from replacement planning.
- 3.Analyze organizational risks associated with leadership vacancies.
- 4.Identify critical positions requiring succession planning interventions.
- 5.Develop competency-based Success Profiles for key roles.
- 6.Identify high-potential employees and establish talent pools.
- 7.Conduct talent reviews using the 9-Box Grid framework.
- 8.Assess employee readiness for future leadership roles.
- 9.Evaluate competency strengths and development gaps.
- 10.Create Individual Development Plans for successor candidates.
- 11.Design mentoring and coaching interventions that accelerate readiness.
- 12.Develop succession planning governance structures.
- 13.Create succession planning policies and implementation processes.
- 14.Establish succession planning metrics and monitoring systems.
- 15.Develop a succession planning framework for their organization.

About the Program

How prepared is your organization when a key leader leaves?

Many organizations discover too late that they have no ready successors for critical positions. Others struggle because succession planning efforts are disconnected from competency management, performance management, leadership development, and career development.

This workshop provides HR professionals, Talent Development practitioners, OD specialists, department heads, and business leaders with a practical roadmap for developing and implementing a Succession Planning and Management Program.

Participants will learn how to:

- Identify critical positions
- Build competency-based success profiles
- Assess leadership potential
- Conduct talent reviews
- Utilize the 9-Box Grid effectively
- Evaluate successor readiness
- Create development plans
- Design mentoring and coaching interventions
- Establish succession governance systems
- Measure succession planning effectiveness

The workshop emphasizes practical application using a comprehensive toolkit of templates, guides, assessment forms, dashboards, and implementation resources.

By the end of the workshop, participants will have developed key components of a succession planning framework that can be immediately adapted for their organizations.

Target Participants

This program is recommended for:

Human Resource Professionals

- HR Managers
- HR Business Partners
- HR Officers
- Talent Management Specialists

Talent Development Professionals

- Learning and Development Managers
- Learning and Development Specialists
- Talent Development Practitioners
- Training Managers

Organization Development Practitioners

- OD Managers
- OD Specialists
- Change Management Professionals

Business Leaders

- Department Heads
- Functional Leaders
- Senior Managers
- Directors
- Business Owners

Government and Non-Profit Professionals

- HR Practitioners
- Learning and Development Officers
- Workforce Planning Professionals

Workshop Outline

Time	Module	Key Topics/Activities
DAY 1: BUILDING THE FOUNDATION		
8:30 – 9:00	Opening Program and Expectations Setting	Establish expectations and workshop outcomes
9:00 – 10:30	Module 1: The Business Case for Succession Planning and Management • Leadership continuity risks • Talent shortages and workforce trends • Succession Planning vs Replacement Planning • Succession Planning as a Talent Development Strategy	Explain the strategic importance of succession planning
10:45 – 12:00	Module 2: Building the Foundation: Critical Roles, Competencies, and Success Profiles • Identifying critical roles • Critical Role Identification Questionnaire • Competency Frameworks • Developing Success Profiles	Identify critical positions and define success requirements
1:00 – 2:30	Workshop Activity: Critical Role Inventory and Success Profile Development	Develop critical role inventories and success profiles
2:45 – 4:00	Module 3: Identifying High Potentials and Building Talent Pools • High Performance vs High Potential • Talent Pools and Acceleration Pools • Nomination and Assessment Processes	Identify potential successors and talent pools
4:00 – 5:00	Workshop Activity: Talent Pool Strategy Development	Develop an acceleration pool strategy

Workshop Outline

Time	Module	Key Topics/Activities
DAY 2: DEVELOPING AND IMPLEMENTING THE PIPELINE		
8:30 – 9:00	Review and Reflection	Reinforce key learning points
9:00 – 10:30	Module 4: Conducting Talent Reviews and Using the 9-Box Grid • Performance Assessment • Potential Assessment • Talent Calibration • Conducting Talent Reviews	Conduct structured talent reviews
10:45 – 12:00	Workshop Activity: 9-Box Grid Simulation	Apply talent review methodologies
1:00 – 2:00	Module 5: Assessing Readiness and Competency Gaps • Readiness Levels • Competency Assessments • Gap Analysis	Evaluate successor readiness
2:00 – 3:00	Module 6: Creating Development Plans for Successors • Individual Development Plans • 70-20-10 Development Model • Development Planning Strategies	Develop successor development plans
3:00 – 3:30	Module 7: Using Mentoring, Coaching, and Development Experiences	Design development interventions
3:30 – 4:00	Module 8: Designing the Succession Planning Framework	Develop a succession planning architecture
4:00 – 4:30	Module 9: Implementing and Governing the Program	Establish governance and accountability
4:30 – 5:00	Module 10: Measuring Success and Sustaining the Talent Pipeline	Develop monitoring and evaluation strategies

Workshop Outputs

Participants will develop the following outputs during the workshop:

Talent Assessment Outputs

- Critical Role Inventory
- Talent Pool Strategy
- Acceleration Pool Framework
- 9-Box Grid Assessment

Competency-Based Outputs

- Competency Framework
- Success Profile
- Competency Assessment Summary

Development Outputs

- Individual Development Plan
- Successor Development Roadmap

Succession Planning Outputs

- Draft Succession Planning Framework
- Succession Governance Structure
- Succession Planning Program Tracker

Complete Succession Planning and Management Toolkit

Participants will develop the following outputs during the workshop:

Training Resources

- Training Presentation
- Participant Manual
- Facilitator Guide

Policy and Governance Resources

- Succession Planning and Management Policy Template

Complete Succession Planning and Management Toolkit

Assessment Tools

- Critical Role Identification Questionnaire
- Competency Framework Template
- Success Profile Template
- Acceleration Pool Candidate Profile Form
- Acceleration Pool Nomination Form
- 9-Box Grid Assessment Tools
- Competency Assessment Tool
- Candidate Assessment Summary

Development Resources

- Development Plan Template

Monitoring Resources

- Succession Planning Program Tracker

Implementation Resources

- Career and Succession Management Workbook
- User Guides
- Sample Completed Forms

Learning Methodology

The workshop utilizes an experiential and application-focused learning approach through:

- Interactive Lectures
- Guided Discussions
- Case Studies
- Talent Review Simulations
- Competency Assessment Exercises
- Succession Planning Workshops
- Peer Consultation Sessions
- Group Discussions
- Action Planning

Facilitator's Profile



Edwin C. Ebreo

CEO & Founder of
ExeQserve Corporation

Why is Ed Ebreo your best choice for conducting this training?

Ed is recognized by the Philippine Society for Talent Development as a Certified Professional Training Designer (CPTD), and Certified Professional Training Facilitator (CPTF). He contributed significantly in the design and delivery of related certification courses to numerous practitioners.

Edwin is a seasoned expert in Organization Development and Talent Management with three decades of diverse experience spanning retail, financial, BPO, and HR consulting sectors. As President of the Philippine Society for Talent Development and host of "Usapang Training Atbp.", he plays a vital role in advancing the talent management practice in the country. Renowned for his proficiency in facilitating strategy formulations, policy development, and change management initiatives, Ed has led numerous projects aimed at enhancing organizational effectiveness and talent development. Widely recognized for his prowess in designing and implementing learning activities tailored to meet clients' unique needs across various industries, his commitment to empowering HR practitioners and individuals underscores his passion for nurturing talent and driving organizational success.

Learning Investment

Details	Duration	Early Bird Rate	Date
Succession Planning and Management	8 hours	Php 3,920.00 (VAT Inclusive)	November 11 and 18, 2026

Note: The early bird rate is valid until November 4, 2026. After this date, the regular rate of PHP 4,480.00 per participant, VAT-inclusive, will apply.

Payment and Registration

Register through our online registration form <https://forms.gle/6rnF4cahC8hUmQzV7>
And follow the instructions to settle your payment.

You may also opt to register through our Account Managers:

Step 1 - Send us a list of participants you want to register. Kindly include their full names, designations, and email addresses.

Step 2 - For the invoice, also provide the following:

- BIR 2303
- Key contact person (Full Name/Designation/Contact Number) for billing purposes.
- Billing Delivery Address

Step 3 - Settle your payments through bank transfer or bank deposit, and send us a copy of the proof of payment.

Bank Details

Account Name: EXEQSERVE CORPORATION

Account No. : 000-0005962-081

Bank: Security Bank (Dela Rosa Branch)

About ExeQserve

EXEQSERVE CORPORATION is an HR and Organization Development solutions provider that has been operating since 2007. As a strategic partner, we have helped our clients build high-performing teams by offering training, public workshops, and other HROD interventions.

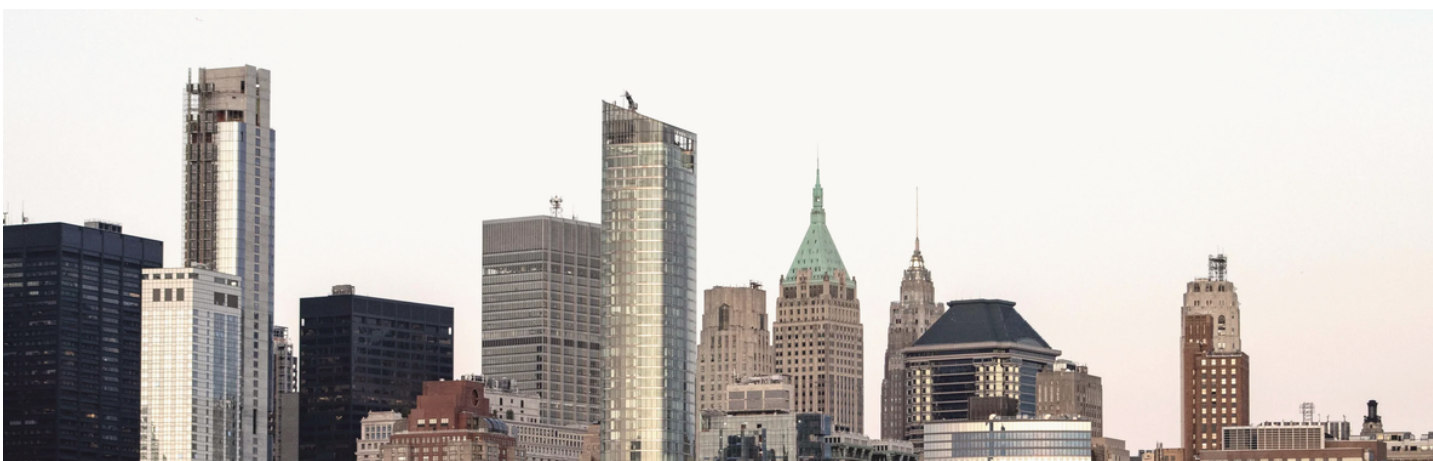
Training

ExeQserve Training will work closely with you to identify your training needs. We tailor-fit our programs to ensure that your employees get exactly what they need. With our passion for fun, balanced with our practical and skills-focused approach, we deliver training that is right for you.

At ExeQserve, we believe that the best way to develop employees' capacity to perform is through a strategic talent development approach.

Consulting

ExeQserve HROD Consulting does its best to understand your organization, its goals, and aspirations, and its current situation and identify the best solution to help enable and empower your employees to contribute to goal achievement. We design employment policies, incentive programs, performance management systems, and other interventions to help you achieve organizational alignment.



Mission and Vision



Our Vision

Powered by a successful team of professionals, ExeQserve shall be a sought-after partner of local and international organizations for our innovative and high quality talent and organization development solutions.



Our Mission

We are committed to providing outstanding services to help companies build teams of high performing individuals



Our Values

Our people are committed to giving value-adding services through:

Pursuit of Excellence

Creativity & Resourcefulness

Customer Intimacy

Flexibility

Teamwork

Fun