



Career Development and Succession Planning Certificate Training Course

22 February – 5 March 2027
Boston (USA)



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Career Development and Succession Planning Certificate Training Course is a 10-day course that connects individual career paths with the organization's pipeline for critical roles. It is for HR business partners, talent and L&D specialists and line managers who guide employee careers. The second week adds career counseling and career path design practice, and you leave with a completed Career and Succession Plan. The course is delivered by Mercury Training Center.

About This Course

Many organizations name successors on paper while employees see no clear route forward, so talent leaves and critical roles stay exposed. To follow this course you should already take part in performance reviews or development planning. You practice on case organizations, role-play career conversations and build your plan step by step across two weeks.

Who It Is For

- HR professionals who partner with business units on workforce and talent decisions
- Talent management staff who run talent reviews and maintain successor lists
- Learning and development staff who design development activities and learning paths
- Line managers who hold career discussions and prepare team members for larger roles
- Career advisors who counsel employees on internal moves and growth options

This course is not for readers new to HR who need a general introduction, who are better served by a foundation course in human resources practice, nor for executives who want only board-level succession strategy, who are better served by a short leadership briefing.

Competencies You Will Build

- Career Path Design: you map job families and routes between roles that employees can follow
- Career Counseling: you run structured conversations that help employees choose realistic next steps
- Potential Assessment: you judge readiness and potential with evidence rather than impression
- Critical Role Analysis: you identify which roles put continuity at risk and why
- Talent Pool Management: you keep successor pools current, rated and developing
- Pipeline Measurement: you report pipeline health with indicators leaders can act on

What You Will Be Able to Do

By the end of the course you will be able to:

- From a set of job descriptions, build a career path map that shows lateral and vertical moves between roles
- Given an employee profile and review results, draft an individual development plan with measurable milestones
- Using competency and performance data, place employees on a performance and potential grid and justify each placement
- From an organization chart and risk criteria, produce a critical role register ranked by vacancy impact
- Given a talent pool, assign readiness ratings and select development actions such as mentoring and job rotation
- Using pipeline indicators, prepare a dashboard that reports bench strength and internal fill rates to leadership

Course Content

Day 1: Foundations of Career and Succession Systems

- Linking Career Development and Succession Planning in One Talent System
- Business Continuity Risk from Unplanned Vacancies
- Roles of HR, Line Managers and Employees in Career Ownership
- Workforce Data Review for Talent Planning
- Setting Scope and Goals for a Career and Succession Plan

Day 2: Career Frameworks and Job Families

- Job Family and Job Level Structures
- Competency Frameworks as the Basis for Career Moves
- Technical and Managerial Career Tracks
- Lateral Moves, Rotations and Project Assignments as Growth Routes
- Career Framework Audit of an Existing Structure

Day 3: Career Path Design

- Career Path Mapping Templates for Role-to-Role Routes
- Entry Requirements and Experience Gates between Levels
- Linking Career Paths to Training Paths
- Publishing Career Paths to Employees
- Career Path Map Drafting for One Job Family

Day 4: Career Conversations and Counseling

- Structured Career Conversation Models for Managers
- Career Counseling Techniques for Values, Interests and Strengths
- Handling Unrealistic Expectations and Plateaued Employees
- Career Anchors and Motivation in Internal Mobility Decisions
- Career Conversation Role-Play with Observer Feedback

Day 5: Individual Development Plans

- Individual Development Plan Templates and Milestones
- Experience, Exposure and Education Mix in Development
- Mentoring and Coaching Agreements
- Tracking Development Progress in Review Cycles
- Individual Development Plan Drafting for a Case Employee

Day 6: Competency and Potential Assessment

- Distinguishing Performance from Potential
- Performance and Potential Grid Placement Criteria
- Behavioral Evidence and Multi-Rater Feedback in Assessment
- Reducing Bias in Talent Ratings
- Calibration Session Practice for Talent Ratings

Day 7: Critical Roles and Succession Risk

- Critical Role Identification by Impact and Scarcity
- Vacancy Risk and Flight Risk Assessment
- Critical Role Register Structure
- Internal Versus External Successor Sourcing Decisions
- Critical Role Register Build for a Case Organization

Day 8: Talent Pools and Readiness

- Talent Mapping and Talent Review Meetings
- Readiness Ratings for Now, Near-Term and Longer-Term Successors
- Development Pools for Second-Line Leaders
- Job Rotation and Stretch Assignment Planning
- Successor Slate Preparation for a Critical Role

Day 9: Pipeline Measurement and Governance

- Bench Strength and Internal Fill Rate Indicators
- Retention of High-Potential Employees as a Pipeline Measure
- Talent Pipeline Dashboard Design for Leadership
- Governance Roles and Review Calendar for Succession
- Communicating Succession Decisions to Employees

Day 10: Integrated Career and Succession Planning Practice

- Exercise Revisiting Career Path Maps against Critical Roles
- Exercise Linking Development Plans to Readiness Ratings
- Exercise Testing the Pipeline Dashboard with Case Data
- Peer Review of Plan Assumptions and Risks
- Completing and Presenting the Career and Succession Plan

Case Studies and Exercises

The following are suggested activities used during the course.

- Case study: a hospital losing experienced nursing supervisors with no ready successors; you rank critical roles and select successor pool actions.
- Case study: an engineering firm where specialists leave because only managerial routes exist; you design a technical career track.
- Exercise: a bank branch manager holds a career conversation with a plateaued employee; you conduct it and agree next steps.
- Exercise: a public service department runs a talent review; you calibrate ratings and set readiness levels.

What You Take Back

You return with a Career and Succession Plan for your own unit. In your first month back you use it to agree critical roles with leadership, open career conversations with your team and start tracking pipeline indicators in regular reviews.

- Career path map for one job family
- Critical role register with readiness-rated successors
- Individual development plan template with mentoring and rotation actions
- Pipeline dashboard with agreed indicators

Quick Answers FAQ

What should I know before a career development and succession planning course?

You should be familiar with performance reviews, job descriptions and basic development planning. No prior succession experience is required, since the course builds the process from the ground up before moving to practice.

How does a two-week career development and succession planning course differ from a short succession course?

A short succession course usually covers successor identification only. The two-week format adds career path design, career counseling practice and development planning, so employee growth and continuity are planned together.

What is the difference between career development and succession planning?

Career development helps each employee grow toward goals that fit the organization. Succession planning makes sure critical roles have ready candidates. Linking them gives successors a route and gives employees visible opportunities.

What do I take back from career development and succession planning training?

You take back a Career and Succession Plan containing a career path map, a critical role register, development plan templates and a pipeline dashboard you can apply in your own unit.

For Your Manager

After the course, your team member will be able to design career paths, hold structured career conversations, assess readiness and maintain successor pools for critical roles. They return with a Career and Succession Plan, first used to agree the unit's critical roles and to start development plans for identified successors in the next review cycle.