



Succession Planning Fails Without Knowledge Capture

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You have a name against every critical role. But does the person who would step in know what the current post-holder knows?

Succession planning is meant to protect the business when someone leaves. It often protects the job title and leaves the knowledge behind.

THE SHORT ANSWER

Succession planning names who will step into critical roles. It often skips what those roles hold in people's heads. Add knowledge capture, built as a living system and not a static archive, so successors learn the how and why while the current post-holder is still in post.

What is succession planning?

The CIPD defines succession planning as *"identifying and growing talent to fill business-critical positions in the future"*. It describes it as a key component of workforce planning, and says the first step is to identify the business-critical roles for which potential successors are needed.

That makes a plan about people: who is ready, who needs development, who could step in tomorrow. The question plans rarely ask is what the person in the role knows that a successor will need. Here, that means what the role holds that is not written down, often called tacit knowledge, and sometimes described as institutional knowledge when it is built up across an organisation over time.

What does the UK data say about succession plans?

Many organisations report no plan. In Robert Walters research reported by People Management in May 2026, 14% of UK organisations had a succession plan in place. Of the 250 organisations surveyed, a mix of large and SME businesses, 39% said they had no succession plan at all and a further 8% were unsure whether one existed.

AI may narrow the pipeline. Successors usually come from the roles below. In the CIPD's Autumn 2025 Labour Market Outlook, 17% of employers expected AI to shrink their workforce over the next year (survey of 2,019 senior HR professionals and decision-makers in the UK, excluding employers

who did not know whether AI tools were used in their organisation). The CIPD reported that, according to those employers, junior roles were most at risk.

Treat both with care. The People Management report focuses on leadership succession, comes from a recruitment consultancy, does not give fieldwork dates and does not say how the remaining organisations answered. The CIPD figure is an expectation, not an outcome. Together they suggest that planning for who can step in, and what they would need to know, deserves attention.

Why does succession planning fail without knowledge capture?

It picks people, not knowledge. A plan can name a ready successor who has never seen the exceptions, the history or the relationships that make the role work. That is *tacit knowledge*, and it does not appear in a succession chart.

It tests the candidate, not the role. The CIPD lists performance reviews and competency assessment among the ways to identify candidates. Those show whether someone is capable. They do not show whether they hold what the current post-holder knows.

It leaves capture to the last weeks. When knowledge is gathered at the point of departure, the *exit interview and handover note* have to carry everything, and they were not built for it.

It describes the role as it is today. If AI changes what the role involves, a successor prepared for the old role may be prepared for the wrong one.

What is a living knowledge system, and how is it different from an archive?

An archive is a store of documents written once, often at the point someone leaves. It is easy to build, and it can go out of date as soon as the work changes.

A living knowledge system is built around real decisions and kept in use. Successors work through real cases with the current post-holder, what they learn is recorded with the reasoning behind it, and someone owns keeping it current as the work changes.

A simple test is whether a successor could handle an unusual case using it. If the answer is no, you have an archive.



How do you build succession planning around knowledge?

1. **Identify the business-critical roles.** This is the CIPD's first step. Add a second question for each: what would be hard to replace if the post-holder left?
2. **Ask what each role holds that is not written down.** Talk about decisions and surprises, not tasks. A skills gap analysis can show where the gaps are.
3. **Pair the post-holder and the successor.** The CIPD notes that secondments help by sharing knowledge and different perspectives. Let the successor work through real cases alongside the person they may replace.
4. **Capture the how and why, and keep it alive.** Record the reasoning, put it where people will look, give it an owner and update it when the work changes.
5. **Test readiness on the hard cases.** Ask whether the successor can handle an unusual situation, not only whether they meet the competencies. Review the plan at least once a year, and whenever AI changes the role.

If you use a succession planning template, add a column for what each role holds that is not written down, and who will pass it on.

Decisions that affect people's jobs carry legal obligations. This post does not cover them, so take specialist employment advice on the process.

Where does Bloor's thinking fit?

Bloor's *OAISM (Original Augmented Intelligence)* work is about building intelligence into the human, not the human into the AI, which suggests treating a successor's learning as the point, not a by-product. Bloor's *Hire to Heir* proposes Return on Intelligence Capital as a metric, measuring "*whether investment in human capability, augmentation design, and knowledge architecture*" is compounding or dissipating value. A living knowledge system is one way to see that in practice.

Bloor Research helps organisations understand where they are now, where they need to be and what is happening inside the business, including through its X-RAY diagnostic. If you want to see which roles hold knowledge your business cannot afford to lose, [contact Bloor Research](#), and ask about its *FusionWorkTM* category for the blended workforce that comes next.

Frequently asked questions

1. **What is succession planning?**
The CIPD defines succession planning as identifying and growing talent to fill business-critical positions in the future. It describes it as a key component of workforce planning.
2. **What are the steps in the succession planning process?**
The CIPD says the first step is to identify business-critical roles for which potential successors are needed. After that, organisations identify candidates, for example through performance reviews or competency assessment, and develop them through lateral moves, secondments and management experience. To protect the knowledge in each role, add a step to capture what the current post-holder knows, while they are still in post.
3. **What should a succession plan include?**
A succession plan should list the business-critical roles, potential successors for each, and how each successor will be developed. It should also record what each role holds that is not written down, who will pass it on, and when the plan will be reviewed.
4. **Why does succession planning fail without knowledge capture?**
A plan can name a ready successor who still lacks what the current post-holder knows, such as the judgement, history and relationships behind the work. Competency checks show whether someone is capable. They do not show whether they hold that knowledge. Decisions that affect people's jobs carry legal obligations, so take specialist employment advice on the process.
5. **How do you capture knowledge for succession planning?**
Ask the current post-holder about decisions, not just tasks, and let the successor work through real cases alongside them. Record the how and why in a place people will use, give it an owner, and update it when the work changes. The aim is a living system that successors use, not an archive written once.
6. **How does AI affect succession planning?**
AI changes what a role involves, so a plan built around today's job description can describe the wrong role. It may also change where successors come from. In the CIPD's Autumn 2025 Labour Market Outlook, 17% of employers expected AI to shrink their workforce over the next year, and the CIPD reported that, according to those employers, junior roles were most at risk.



Sources

- **CIPD, *Succession planning factsheet*** (definition, first step, candidate identification, secondments and workforce planning).
- **People Management, *Only one in seven organisations have a leadership succession strategy in place, research finds***, 6 May 2026, reporting research by Robert Walters. 39% of the 250 organisations surveyed (a mix of large and SME businesses) had no succession plan and a further 8% were unsure whether one existed; the article does not give fieldwork dates, and the 14% figure refers to UK organisations with a plan in place.
- **CIPD, *One in six employers say AI will shrink headcount: Autumn Labour Market Outlook***, press release 10 November 2025. Total sample 2,019 senior HR professionals and decision-makers in the UK; fieldwork 19 September to 14 October 2025. The 17% figure excludes employers who did not know whether AI tools are used by employees in their organisation (6% of the total sample).

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