



Suhas Bhairav

AI Corporate Succession Planning Skill Matrix Guide

**Data-backed AI mapping of internal managers for
key exec roles.**

A practical, auditable blueprint to securely identify
internal executive backups using AI.

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What to automate, review, and data needs

Identify tasks suited for AI-driven automation and those requiring human oversight. List data sources, tools, and governance requirements to support the workflow.

Key move **Action: Define the pilot scope for CEO-level backups and secure approvals before data ingestion.**

PRACTICAL CHECKLIST

- 01** Ingest data from HRIS, performance, learning, and payroll to build current manager profiles (tenure, skills, roles).
- 02** Automate mapping of skills to role requirements and surface internal candidates for critical executive positions.
- 03** Keep automated outputs under human review by a governance board to verify data quality and privacy.
- 04** Define a data model: manager, current role, readiness score, development plan, and risk flags.
- 05** Leverage AI agents and dashboards to simulate scenarios for CEO/CFO/CTO backup pools.
- 06** Pilot on 1–2 roles with weekly data refresh and governance sign-offs.
- 07** Guardrails: role-based access, encryption, retention, and audit trails for every step.

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Data sources, tools, and process flow

This page details data sources, tooling, and the process flow to build the succession-matrix. It shows how to run pilots and measure results.

Key move **Announce privacy guardrails and data retention rules before processing any history data.**

PRACTICAL CHECKLIST

- 01** Data sources: HRIS, payroll, performance reviews, learning records, promotions, succession histories, org charts, and compliance logs.
- 02** Data quality: standardize fields, resolve duplicates, and log lineage for auditability.
- 03** Tools: secure data lake, AI agents for matrix building, governance dashboards, and role-based access controls.
- 04** Process workflow: weekly data refresh, stakeholder reviews, and sign-offs on outputs.
- 05** Examples: run CEO and CFO backup mapping with readiness scores and development actions.
- 06** Ownership: appoint a Strategy Analytics Lead and HR liaison; define accountability and escalation paths.
- 07** Measurement: track accuracy of AI recommendations, time-to-identify backups, and policy adherence.

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Weekly adoption plan and governance flags

This page presents a weekly adoption plan, governance, and ownership. It covers risk management and how to scale responsibly.

Key move Always certify senior sponsorship before automated outputs are shared.

PRACTICAL CHECKLIST

- 01** Week 1: inventory data sources, secure permissions, and privacy risk assessment.
- 02** Week 2: build data model prototype and seed internal candidate pool.
- 03** Week 3: run pilot mappings for 1 role with human review.
- 04** Week 4: present findings to governance, adjust guardrails, and define development actions.
- 05** Ongoing: monthly refreshes, audits, and re-approval of outputs.
- 06** Ownership: designate a Transformation Owner, with clear RACI and escalation path.
- 07** Risks: false positives, privacy violations, data drift; mitigate with reviews.

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ABOUT THE CREATOR

Suhas Bhairav

I build AI systems that combine distributed architecture, retrieval, knowledge graphs, security, and practical workflow design. My focus is AI that can be used repeatedly by real teams: understandable, reliable, and grounded in the work people already do.

EXPERTISE

- Principal systems architecture and applied AI engineering
- Production-grade AI systems, agentic workflows, RAG, and knowledge graphs
- Full-stack workflow applications across AWS, Google Cloud, Azure, on-premise, and hybrid environments
- Practical AI implementation patterns for automotive, manufacturing, finance, logistics, cybersecurity, sales, and customer operations
- Security, governance, observability, approvals, and failure-mode thinking for operational AI systems

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