

**Organisation:** Northbridge Advisory Partners **Extract Date:** 20 January 2027 **Source:** HRIS Talent Module and Manager Submissions  
**Prepared By:** L&D Manager, People Development **Confidentiality:** Internal - Restrict Access

*Capability profiles for internal candidates identified as potential successors for critical roles. Profiles are compiled from HRIS records, manager-submitted assessments, and the most recent performance review cycle. Candidates are listed by current role title only.*

## Candidate A — Principal Consultant, Strategy & Operations

**Current Level:** Principal Consultant (promoted H2 2026 cycle) **Department:** Strategy & Operations **Tenure:** 4.5 years **Mapped to Critical Roles:** CR-1 (Practice Head, Data & AI Advisory), CR-2 (Director of Client Delivery)

### Capability Assessment

Capability Area	Rating	Evidence Summary
Client Advisory & Delivery	Strong	Post-acquisition integration delivered 2 weeks early. Client NPS contribution 72. Managed quarterly business reviews to client COO with no escalations.
Business Development	Strong	Two proposals submitted: \$340K logistics extension won, \$180K diagnostic shortlisted. Strongest pipeline contribution in the practice for H2 2026.
Stakeholder Management	Strong	Cross-practice coordination on integration project. Executive steering committee participation with no escalations. \$85K scope extension negotiated.
Leadership & Team Development	Strong	Peer feedback cites effective project management. Seamless mid-project onboarding of new team member.
Knowledge Sharing	No Evidence	No formal sessions, publications, or documented mentoring contributions on record.
Strategic Planning	Not Assessed	No formal assessment of strategic planning capability has been conducted. Manager notes indicate "strong operational instincts but untested on practice-level strategy."

### Development Notes

- Knowledge Sharing gap was flagged during the H2 2026 promotion panel. A post-promotion commitment requires two knowledge-sharing contributions in the first six months.
- Financial Modelling elective deferred; expected completion by end of Q1 2027.
- The manager narrative describes this candidate as delivery-focused with limited exposure to practice-level P&L or headcount planning.

## Candidate B — Lead Engineer, Technology Advisory

**Current Level:** Lead Engineer (promoted H2 2026 cycle) **Department:** Technology Advisory **Tenure:** 3 years **Mapped to Critical Roles:** CR-3 (Head of Technology Advisory)

## Capability Assessment

Capability Area	Rating	Evidence Summary
Technical Excellence	Strong	47-workload cloud migration at 99.8% uptime. 22% post-migration cost reduction. AWS Solutions Architect Professional certified (first attempt).
Knowledge Sharing	Strong	Two highly-rated brown-bag sessions. Published multi-cloud networking runbook. Formal mentoring agreement with a junior engineer.
Stakeholder Management	Strong	Weekly client CTO office syncs. Security escalation within SLA. "Trusted partner" feedback from client.
Professional Development	Strong	AWS certification ahead of schedule. Security specialisation track on plan.
Business Development	Partial	One proposal contribution won (\$120K). Managed services upsell identified but not progressed. Manager noted the candidate "waited for the Engagement Manager to initiate."
Leadership & Team Development	Partial	Peer feedback pattern: does work rather than delegating to the team. Contradicts the delegation expectation at Lead Engineer level.

## Development Notes

- Delegation gap was explicitly flagged by the H2 2026 promotion panel. Practice Head, Technology Advisory committed to a team leadership coaching programme in Q1 2027.
- Commercial contribution to be developed through pairing with an Engagement Manager on Q1 2027 proposals.
- The incumbent Head of Technology Advisory has informally identified this candidate as a potential successor, but no formal readiness assessment has been completed.

## Candidate C — Engagement Manager, Strategy & Operations

**Current Level:** Engagement Manager (deferred at H2 2026 cycle — promotion to Senior Engagement Manager not approved)

**Department:** Strategy & Operations **Tenure:** 6 years **Mapped to Critical Roles:** CR-2 (Director of Client Delivery)

## Capability Assessment

Capability Area	Rating	Evidence Summary
Client Delivery Management	Strong	\$1.2M managed across three concurrent engagements, all on time. Client satisfaction 4.4/5.0.
Business Development	Strong	Three proposals: \$295K won, \$150K pending. Strongest pipeline contribution in the practice.
Stakeholder Management	Strong	Two executive steering committees with no escalations. \$85K scope extension secured.
Professional Development	Moderate	Negotiation Skills programme completed. 360-degree feedback initiated but summary not submitted.
Knowledge Sharing	Partial	One case study published. No sessions or methodology contributions.
Leadership & Team Development	Partial	Peer feedback and manager narrative flag a pattern of centralising decisions rather than empowering team leads. This concern appeared in the two previous review cycles as well.

## Development Notes

- The H2 2026 promotion panel deferred this candidate specifically due to the missing 360-degree feedback summary and the persistent delegation pattern across three review cycles.
- 90-day development plan to be agreed by 7 February 2027, including: completing the 360-degree feedback, implementing a documented delegation protocol, and delivering one brown-bag session.
- This candidate's commercial performance is the strongest in the practice, but the panel determined that team empowerment is a critical capability at Senior Engagement Manager and Director levels.

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## Candidate D — Senior HR Business Partner, People & Culture

**Current Level:** Senior HR Business Partner **Department:** People & Culture **Tenure:** 5 years **Mapped to Critical Roles:** CR-4 (Head of People Operations)

### Capability Assessment (as of Q2 2025 cycle — not yet updated for H2 2026)

Capability Area	Rating	Evidence Summary
HR Operations	High	Led the post-acquisition HR integration for two of three acquired entities. Consolidated onboarding processes across legacy teams.
Employee Relations	High	Managed 14 ER cases in 2025, including two complex investigations. No cases escalated beyond initial resolution.
Policy & Compliance	Medium	Contributed to three policy reviews. Has not led a full policy overhaul independently.
Stakeholder Management	High	Trusted advisor to two Practice Heads. Regular attendee at leadership team meetings.
HRIS & Data	Low	Limited HRIS system proficiency. Relies on the HRIS Administrator for most reporting and data extracts.

## Development Notes

- This profile uses the legacy rating scale (High / Medium / Low) from the Q2 2025 cycle. The 2026 assessment cycle adopted a new scale (Strong / Partial / No Evidence) but this candidate's profile has not been converted.
- No formal succession conversation has taken place for the Head of People Operations role.
- The L&D Manager has flagged that the HRIS capability gap would need to be addressed before this candidate could independently manage the operational reporting requirements of the Head role.

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## Candidate E — Employee Relations Specialist, People Operations

**Current Level:** Employee Relations Specialist **Department:** People Operations **Tenure:** 2.5 years **Mapped to Critical Roles:** CR-4 (Head of People Operations)

## Capability Assessment

Capability Area	Rating	Evidence Summary
Employee Relations	Strong	Handles day-to-day ER casework. Managed the recurring flexible working policy dispute thread across three departments. Positive feedback from line managers on case communication.
Policy Governance	Partial	Assisted with two of the nine overdue policy reviews. Has not led a review end-to-end.
HR Operations	Partial	Familiar with operational workflows but has not managed cross-functional HR projects. Experience is narrower than the Head of People Operations scope.
Leadership	No Evidence	No documented team leadership, delegation, or mentoring activities. Current role is an individual contributor position.
Stakeholder Management	Partial	Effective with line manager stakeholders. No exposure to executive-level HR conversations or leadership team presentations.

## Development Notes

- Relatively junior in tenure and scope. Strong specialist skills but limited breadth for a Head-level role.
- No formal development plan exists for succession readiness.
- The Head of People Operations has noted informally that this candidate "has the right instincts for ER but would need significant broadening before stepping up."

## Data Quality Notes

1. Candidate D's profile uses the legacy rating scale (High / Medium / Low) from Q2 2025 and has not been updated to the current cycle's scale (Strong / Partial / No Evidence). Direct comparison with other candidates requires manual conversion.
2. Candidate C's 360-degree feedback summary is missing from the file. The HR Business Partner flagged this as an incomplete submission during the H2 2026 promotion panel.
3. Candidate A has no formal assessment for Strategic Planning capability. The "Not Assessed" entry reflects that this competency was not included in the standard assessment template for their prior role level.

AGASI AiOS — Sample material. For illustrative purposes. All data is fictional.