

Organisation: Northbridge Advisory Partners **Assessment Date:** February 2027 **Prepared For:** HR Director, People & Culture; Talent Management Lead **Confidentiality:** Internal - Restrict Access

CR-2 — Director of Client Delivery

- **Gap Severity:** High
 - **Immediate Action:** Establish an acting Director arrangement with the Principal Consultant, Strategy & Operations effective upon the current incumbent's departure, with a formal handover plan covering the three post-acquisition integration coordination responsibilities and client escalation protocols.
 - **Development Actions:**
 - **Stretch Assignment** — Assign the Principal Consultant as shadow lead on one executive steering committee for a current engagement during the remaining notice period to build Director-level client relationship exposure.
 - **Targeted Training** — Enrol the Principal Consultant in the Financial Modelling elective (already deferred from Q1 2027 commitments) to strengthen analytical capability required for resource allocation decisions.
 - **Cross-Functional Exposure** — Include the Principal Consultant in the Q1 2027 cross-practice resource planning sessions to build familiarity with the full delivery portfolio, not just the Strategy & Operations practice.
 - **Acceleration Option:** If the current incumbent departs before the handover plan is complete, the COO should serve as interim co-lead alongside the acting Director for the first 30 days to ensure client continuity on active escalations.
 - **Timeline:** Immediate transition within 60 days (aligned with incumbent notice period). Target full readiness within 6 months post-appointment.
 - **Success Indicator:** The acting Director manages at least one cross-practice resource allocation cycle and one client escalation independently with documented outcomes.
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CR-1 — Practice Head, Data & AI Advisory

- **Gap Severity:** High
- **Immediate Action:** Formalise the Principal Consultant, Strategy & Operations as the identified successor for this role and initiate a structured practice leadership exposure programme. If the Principal Consultant is deployed to CR-2 (Director of Client Delivery), escalate CR-1 to the Talent Management Lead for an external pipeline or alternative internal candidate identification.
- **Development Actions:**
 - **Mentoring** — Pair the successor candidate with the current Practice Head, Data & AI Advisory for monthly practice strategy discussions covering P&L management, client portfolio decisions, and headcount planning.
 - **Stretch Assignment** — Assign the successor to lead one business development pursuit in the Data & AI practice during Q2 2027, with the current Practice Head as advisor rather than lead.
 - **Knowledge Sharing** — The successor must deliver two knowledge-sharing sessions (committed as a post-promotion requirement from the H2 2026 panel) within the Data & AI practice rather than their home practice, building visibility and credibility with the team they would lead.
- **Acceleration Option:** If the current Practice Head's transition timeline accelerates to under 12 months, initiate a parallel external search to build a competitive slate while the internal candidate continues development.
- **Timeline:** 18-month development sprint targeting Ready Now status by mid-2028, aligned with the incumbent's communicated 18-24 month transition interest.
- **Success Indicator:** The successor independently leads one Data & AI business development pursuit from proposal to decision, and receives positive feedback from at least two Data & AI practice team members on leadership credibility.

CR-3 — Head of Technology Advisory

- **Gap Severity:** Moderate
- **Immediate Action:** Formalise the Lead Engineer, Technology Advisory as the identified successor and convert the incumbent's informal endorsement into a documented development agreement with milestone reviews.
- **Development Actions:**
 - Coaching — Continue the team leadership coaching programme committed at the H2 2026 promotion panel, with specific delegation targets (team leads making at least two client-facing decisions per week without escalation, per the promotion panel's recommendation).
 - Stretch Assignment — Pair the Lead Engineer with an Engagement Manager on at least two Q1-Q2 2027 proposals to build commercial contribution skills. The first proposal should involve the Lead Engineer drafting the technical scope and pricing section.
 - Cross-Functional Exposure — Include the Lead Engineer in one quarterly client portfolio review with the Managing Partner to build practice-level strategic awareness beyond technical delivery.
- **Acceleration Option:** If the incumbent's planned 3-5 year horizon shortens, the Lead Engineer should transition to a Deputy Head arrangement with shared client relationship ownership for the top three financial services accounts.
- **Timeline:** 24-month development sprint targeting Ready Now status by early 2029, within the incumbent's indicated timeline.
- **Success Indicator:** The Lead Engineer leads one proposal end-to-end with documented commercial outcome, and peer feedback confirms sustained delegation behaviour change over two consecutive quarters.

CR-4 — Head of People Operations

- **Gap Severity:** Moderate
- **Immediate Action:** Conduct a formal vacancy risk assessment with the current incumbent and HR Director to determine whether succession urgency exists. Update the Critical Role Registry entry to use the approved criticality scale and a current review date.
- **Development Actions:**
 - Targeted Training — Address the Senior HR Business Partner's HRIS proficiency gap through a structured learning programme on the HRIS reporting and analytics modules, co-designed with the HRIS Administrator.
 - Stretch Assignment — Assign the Senior HR Business Partner to lead one of the nine overdue policy reviews end-to-end (rather than contributing to reviews led by others) to build policy governance leadership evidence.
 - Mentoring — Establish a formal mentoring arrangement between the current Head of People Operations and the Employee Relations Specialist to broaden the specialist's exposure beyond ER casework into HR operations and stakeholder management.
- **Acceleration Option:** If a vacancy materialises before either candidate reaches Ready 1-2 Years, the HR Director should consider a shared leadership arrangement with the Senior HR Business Partner covering operations and the Employee Relations Specialist covering ER casework until a permanent appointment is made.
- **Timeline:** 12-month development sprint for the Senior HR Business Partner to move from Development Needed to Ready 1-2 Years. 24-month horizon for the Employee Relations Specialist.
- **Success Indicator:** The Senior HR Business Partner completes one policy review independently with sign-off from the HR Director, and demonstrates HRIS reporting proficiency by producing one quarterly compliance report without HRIS Administrator assistance.

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