

Performance Review Packs ◆ Promotion Candidates

Cycle: Current promotion review **Organisation:** Northbridge Advisory Partners **Prepared By:** HR Business Partner, People & Culture **Date Compiled:** Current panel compilation window **Confidentiality:** Internal ◆ Restrict Access

This document compiles the performance review packs for four employees nominated for promotion during the current promotion cycle. Each pack was prepared by the candidate's direct manager with GenAI drafting assistance and reviewed by the HR Business Partner. The packs follow the standard Northbridge review template.

Candidate 1 ◆ Senior Data & AI Consultant ? Principal Consultant

Department: Data & AI Advisory ◆ Applied AI Sub-Team **Current Level:** Senior Consultant **Proposed Level:** Principal Consultant **Nominating Manager:** Practice Head, Data & AI Advisory **Review Period:** Current performance review cycle

Goal Attainment Overview

Goal ID	Goal Area	Attainment Rating	Evidence Summary
G1	Technical Delivery	Meets	Architecture options paper approved with minor comments; vector database evaluation informed client technology selection; implementation report received 4.5 from Client Technical Lead. One omission (fallback strategy) caught by client and remediated within 48 hours.
G2	Stakeholder Engagement	Partially Meets	Client satisfaction 4.3/5.0 on GenAI pilot; strong working relationships with Client Technical Lead and Business Sponsor. Steering presentation ran 8 minutes over; data residency question deferred. Cross-practice networking not pursued systematically.
G3	Business Development	Below	One proposal contribution (retail data strategy) requiring two revision rounds. No second contribution. Follow-on opportunity flagged but not formally pursued.
G4	Knowledge Sharing & Team Contribution	Partially Meets	One brown-bag session (4.2/5.0 rating, 14 attendees). No formal second-half session. Three informal mentoring sessions (not formalised).
G5	Professional Development	Meets	Azure AI Engineer Associate (AZ-102) achieved in the second half of the review period (second attempt). Learning budget used appropriately.

Manager Narrative (Excerpt)

Technical delivery is consistently strong ◆ this is the most reliable individual contributor on the Applied AI sub-team for implementation quality. The GenAI knowledge assistant pilot was delivered on time with zero critical defects and a 4.3/5.0 client satisfaction rating. The gap is commercial readiness: the sole proposal contribution required two revision rounds and the consultant did not pursue the follow-on opportunity that was identified. For Principal Consultant, Northbridge expects candidates to contribute proactively to pipeline development, not only when assigned. Stakeholder management at the executive level also needs sharpening ◆ the steering committee over-run and deferred question are not unusual for this level, but they would be unacceptable at Principal level.

Peer Feedback Summary

- "Strong technical communicator. Explains complex topics in terms business stakeholders can follow." ◆ Senior Consultant, Strategy & Operations
- "Reliable on deadlines. Could be more visible outside the immediate project team." ◆ Engagement Manager, Data & AI Advisory
- "Helped me troubleshoot a client data pipeline issue outside of project hours ◆ generous with time." ◆ Junior Analyst, Applied AI Sub-Team

Capability Gap Summary (from HR12)

Gap ID	Capability Area	Priority
GAP-1	Executive Communication	High
GAP-2	Proposal & Commercial Writing	High
GAP-3	Sustained Knowledge Sharing	Medium
GAP-4	Cross-Practice Relationship Building	Low

Candidate 2 ♦ Senior Management Consultant ? Principal Consultant

Department: Strategy & Operations **Current Level:** Senior Consultant **Proposed Level:** Principal Consultant **Nominating Manager:** Practice Head, Strategy & Operations **Review Period:** First half of plan year (full cycle)

Goal Attainment Overview

Goal ID	Goal Area	Attainment Rating	Evidence Summary
G1	Client Delivery & Project Leadership	Exceeds	Led the post-acquisition integration programme for the logistics client ♦ delivered final operating model 2 weeks ahead of schedule. Client NPS contribution: 72.
G2	Stakeholder Engagement	Meets	Presented quarterly business reviews to the logistics client COO with no escalations. Coordinated cross-practice staffing with Data & AI Advisory for the integration workstream.
G3	Business Development	Meets	Two proposal contributions: logistics client extension (\$340K) and financial services operating model diagnostic (\$180K). Logistics extension was won; financial services proposal reached shortlist but was not awarded.
G4	Knowledge Sharing & Team Contribution	Below	No formal knowledge-sharing sessions delivered. Self-assessment cites "competing delivery priorities" for both halves of the review period. Informal mentoring of one junior consultant noted but undocumented.
G5	Professional Development	Partially Meets	Completed one of two planned electives (Advanced Facilitation). Second elective (Financial Modelling for Consultants) deferred to the next plan quarter.

Manager Narrative (Excerpt)

This is a high-performing delivery consultant who has earned genuine client trust. The logistics integration programme was the most complex engagement Strategy & Operations ran this half, and the fact that it landed early with positive client feedback speaks to real project leadership capability. Business development contributions are solid ♦ two proposals, one converted. The concern for Principal Consultant promotion is breadth: knowledge-sharing and internal visibility are weak. No brown-bag sessions, no published case studies, no contribution to the practice methodology library. The self-assessment attributes this to workload, but at Principal level we expect candidates to sustain both internal and external contribution. The deferred professional development elective is a minor flag but consistent with a pattern of deprioritising non-client activities.

Peer Feedback Summary

- "One of the best project managers I've worked with. Keeps complex workstreams on track without micromanaging." ♦ Consultant, Strategy & Operations
- "Very client-focused, sometimes at the expense of internal team engagement." ♦ Senior Consultant, Data & AI Advisory
- "I was staffed onto the logistics integration mid-project and the onboarding was seamless ♦ clear RACI, well-organised shared drive." ♦ Consultant, Strategy & Operations

Capability Gap Summary

Gap ID	Capability Area	Priority
GAP-1	Internal Knowledge Contribution	High
GAP-2	Professional Development Follow-Through	Medium

Candidate 3 ♦ Senior Cloud Infrastructure Engineer ? Lead Engineer

Department: Technology Advisory ♦ Cloud & Infrastructure **Current Level:** Senior Engineer **Proposed Level:** Lead Engineer **Nominating Manager:** Practice Head, Technology Advisory **Review Period:** First half of plan year (full cycle)

Goal Attainment Overview

Goal ID	Goal Area	Attainment Rating	Evidence Summary
G1	Technical Delivery	Exceeds	Led cloud migration for financial services client ♦ 47 workloads migrated with 99.8% uptime during cutover. Post-migration cost reduction: 22% against baseline.
G2	Stakeholder Engagement	Meets	Managed weekly syncs with client CTO office. Escalation on security classification handled within SLA. Feedback from Client Infrastructure Lead: "Trusted partner for our cloud decisions."
G3	Business Development	Partially Meets	One proposal contribution (infrastructure assessment for healthcare client, \$120K ♦ won). Identified a managed services upsell but did not advance it to proposal stage.
G4	Knowledge Sharing & Team Contribution	Exceeds	Two brown-bag sessions (cloud cost optimisation: 4.6/5.0, 18 attendees; Kubernetes troubleshooting: 4.4/5.0, 12 attendees). Published internal runbook on multi-cloud networking. Formal mentoring agreement with a junior engineer (quarterly reviews documented).
G5	Professional Development	Meets	AWS Solutions Architect Professional certification achieved in the first attempt window (first attempt). Completed the security specialisation elective ahead of schedule.

Manager Narrative (Excerpt)

This is a clear promotion case on technical and team contribution grounds. The financial services cloud migration was the largest infrastructure engagement this year and the delivery quality was exceptional ♦ 99.8% cutover uptime is the best result we have recorded for a migration of this scale. Knowledge sharing is a genuine strength: the two brown-bag sessions were among the highest-rated in the Technology Advisory practice, the multi-cloud networking runbook has been referenced by three other project teams, and the formal mentoring arrangement is exemplary. The development area is commercial breadth. One proposal contribution was made and won, but the managed services upsell opportunity was not progressed. For Lead Engineer, we expect candidates to translate technical credibility into recurring business development activity, not one-off contributions. The manager notes that the engineer "could have owned the upsell conversation but waited for the Engagement Manager to initiate."

Peer Feedback Summary

- "The go-to person for cloud architecture questions across the practice." ♦ Senior Engineer, Cloud & Infrastructure
- "Runs the best brown-bag sessions in Technology Advisory ♦ practical, well-prepared, and generous with follow-up." ♦ Consultant, Data & AI Advisory
- "Technically excellent but sometimes defaults to doing the work rather than delegating to the team." ♦ Engineer, Cloud & Infrastructure

Capability Gap Summary

Gap ID	Capability Area	Priority
GAP-1	Proactive Business Development	High
GAP-2	Delegation & Team Leverage	Medium

Candidate 4 ♦ Engagement Manager ? Senior Engagement Manager

Department: Data & AI Advisory **Current Level:** Engagement Manager **Proposed Level:** Senior Engagement Manager **Nominating Manager:** Practice Head, Data & AI Advisory **Review Period:** First half of plan year (full cycle)

Goal Attainment Overview

Goal ID	Goal Area	Attainment Rating	Evidence Summary
G1	Client Delivery & Revenue	Exceeds	Managed three concurrent engagements totalling \$1.2M in the current review half. All three delivered on time. Client satisfaction average: 4.4/5.0.
G2	Stakeholder Engagement	Exceeds	Presented at two client executive steering committees with no escalations. Secured approval for scope extension on the manufacturing analytics engagement (\$85K incremental).

Goal ID	Goal Area	Attainment Rating	Evidence Summary
G3	Business Development	Meets	Three proposal contributions: manufacturing analytics extension (won, \$85K), retail predictive maintenance scoping (won, \$210K), public sector data strategy (submitted, pending). Pipeline contribution: \$295K won, \$150K pending.
G4	Knowledge Sharing & Team Contribution	Partially Meets	One case study published (manufacturing analytics). No brown-bag sessions. Self-assessment notes: "I prefer writing to presenting 💎 need to push myself on this."
G5	Professional Development	Meets	Completed Negotiation Skills for Senior Leaders programme. 360-degree feedback initiated and results received.

Manager Narrative (Excerpt)

The Engagement Manager is the strongest commercial performer in the Data & AI Advisory practice this cycle. Three concurrent engagements managed without delivery issues is noteworthy, and the pipeline contribution of \$295K won plus \$150K pending exceeds the Senior Engagement Manager benchmark. Stakeholder management at the executive level is effective 💎 the steering committee presentations went smoothly and the manufacturing scope extension demonstrates real client trust. The gap is internal visibility and knowledge sharing. One published case study is a start, but no brown-bag sessions or methodology contributions were made. The self-assessment acknowledges a preference for written over verbal knowledge sharing, which is a development area for the Senior Engagement Manager role where practice-level thought leadership is expected. The 360-degree feedback results also flagged a tendency to "hold decisions close" rather than empowering team leads on engagements 💎 this is consistent with the delegation pattern noted in two previous review cycles.

Note from HR Business Partner: The 360-degree feedback summary referenced in the manager narrative was not included in the submitted review pack. The HR Business Partner has requested it but has not received it as of the compilation date. This is flagged as an incomplete submission.

Peer Feedback Summary

- "Best engagement manager for client-facing work. Clients trust the Engagement Manager implicitly." 💎 Senior Consultant, Data & AI Advisory
- "Could involve the team more in client decisions 💎 sometimes we learn about direction changes after the fact." 💎 Consultant, Data & AI Advisory
- "The case study on the manufacturing engagement was well-written and useful for the next proposal." 💎 Talent Acquisition Lead (referencing employer brand content)

Capability Gap Summary

Gap ID	Capability Area	Priority
GAP-1	Verbal Knowledge Sharing & Thought Leadership	High
GAP-2	Delegation & Team Empowerment	Medium

Compilation Notes

- **Candidate 1** review pack was generated via the HR12 Performance Review workflow using GenAI drafting assistance. The full review pack including evidence log is available in the HRIS.
- **Candidate 4** review pack is flagged as incomplete 💎 the 360-degree feedback summary was not attached. Panel members should note this gap when reviewing.
- Rating scales differ between practices: Data & AI Advisory uses a 5-point scale (Below / Partially Meets / Meets / Exceeds / Outstanding) while Strategy & Operations and Technology Advisory use the same labels but apply "Outstanding" only for practice-wide impact. This inconsistency has been raised with the HR Director but is unresolved for this cycle.
- All review packs have been redacted to remove compensation data per panel governance guidelines.