

Promotion Criteria Framework

Organisation: Northbridge Advisory Partners **Applicable To:** Current promotion cycle — All Practices **Approved By:** HR Director, People & Culture **Last Updated:** Current criteria framework version **Document Status:** Active

1. Purpose

This framework defines the criteria against which all promotion nominations are assessed during calibration panels. Every candidate must be evaluated against each criterion, and evidence must be drawn from the performance review pack and supporting documentation.

2. Promotion Criteria

Criterion 1: Technical / Functional Excellence

Definition: Demonstrates expert-level capability in their domain, delivering work that meets or exceeds client and internal quality standards. Work product is relied upon by clients and peers without significant rework.

Evidence Expectations:

- Client satisfaction ratings on deliverables (minimum 4.0/5.0 average)
- Examples of deliverables that informed client decisions or were adopted without major revision
- Peer recognition of domain expertise

Threshold for Strong: Client satisfaction \geq 4.0/5.0 on primary deliverables; at least one deliverable that directly influenced a client decision.

Criterion 2: Stakeholder & Client Management

Definition: Manages client and internal stakeholder relationships effectively at the level expected of the proposed role. Communicates clearly, manages expectations, and resolves issues without unnecessary escalation.

Evidence Expectations:

- Client feedback or survey results referencing relationship quality
- Examples of stakeholder presentations, steering committees, or review meetings managed
- Escalation history (frequency and resolution approach)

Threshold for Strong: No unresolved client escalations attributable to the candidate; positive stakeholder feedback in at least two instances.

Criterion 3: Business Development & Commercial Contribution

Definition: Contributes actively to revenue generation through proposal writing, opportunity identification, scope extensions, or pipeline development appropriate to the proposed level.

Evidence Expectations:

- Number and value of proposal contributions
- Win rate on proposals where the candidate was a named contributor
- Examples of upsell or extension opportunities identified and pursued

Threshold for Strong: At least two proposal contributions in the review period, with at least one resulting in a win or active pipeline opportunity.

Note: This criterion was updated in the current criteria refresh to increase the threshold from one to two proposal contributions. Candidates whose review period began before that refresh should be assessed against the updated threshold per the HR Director's instruction, though some nominating managers may have used the prior standard when writing review narratives.

Criterion 4: Knowledge Sharing & Internal Contribution

Definition: Shares expertise with the broader organisation through formal sessions, published materials, mentoring, or methodology contributions. Builds the collective capability of the practice and firm.

Evidence Expectations:

- Brown-bag sessions, workshops, or training delivered (with attendance and ratings)
- Published case studies, runbooks, or methodology assets
- Formal or informal mentoring relationships documented

Threshold for Strong: At least two formal knowledge-sharing contributions (sessions, publications, or mentoring agreements) in the review period.

Criterion 5: Leadership & Team Development

Definition: Demonstrates behaviours consistent with the leadership expectations of the proposed role, including delegation, team empowerment, coaching, and constructive challenge.

Evidence Expectations:

- Peer and direct-report feedback referencing leadership behaviours
- Examples of delegation, coaching conversations, or team development actions
- 360-degree feedback results (where available)

Threshold for Strong: Positive peer or direct-report feedback on leadership behaviours; evidence of at least one coaching or delegation action.

Criterion 6: Professional Development & Growth Trajectory

Definition: Actively pursues professional growth through certifications, electives, structured learning, and self-directed skill development. Demonstrates a clear trajectory aligned with the proposed role.

Evidence Expectations:

- Certifications or formal learning completed in the review period
- Learning budget utilisation
- Development plan progress and self-assessment quality

Threshold for Strong: At least one completed certification or formal elective; learning budget utilised; development plan current.

3. Rating Scale

Each criterion is rated on the following scale:

Rating	Definition
Strong	Evidence meets or exceeds the stated threshold. The candidate is at or above the level expected for the proposed role on this criterion.
Partial	Some evidence exists, but it falls short of the threshold or is inconsistent. The candidate demonstrates capability but has not yet fully met the standard for the proposed role.
No Evidence	No supporting evidence was found in the review pack or supporting documentation. The candidate has not demonstrated this capability during the review period.

4. Overall Promotion Readiness

Overall Assessment	Rule
Ready for Promotion	Strong on at least 4 of 6 criteria, with no criteria rated No Evidence.
Defer with Development Plan	Strong on at least 3 of 6 criteria, or has 1 criterion rated No Evidence with a documented remediation plan.
Not Ready	Strong on fewer than 3 of 6 criteria, or has 2+ criteria rated No Evidence.

Legacy note: The prior-year framework used a three-tier system (Exceeds / Meets / Below) that mapped differently to promotion readiness. The current six-criterion model was adopted in a prior planning cycle. Some historical review packs and manager narratives may still reference the old "Exceeds / Meets / Below" terminology. Panels should map legacy ratings to the current scale where necessary, using the following approximate equivalence: Exceeds ≈ Strong, Meets ≈ Partial, Below ≈ No Evidence.

5. Panel Process Reference

Panels should apply these criteria in conjunction with the Panel Governance Guidelines, which cover quorum requirements, conflict-of-interest rules, and decision documentation standards.

The HR Business Partner is responsible for preparing the Promotion Evidence Matrix prior to the panel meeting. The Panel Chair is responsible for ensuring consistent application across all candidates reviewed in the same session.