

HR13 · STEP 2 · INTERIM

Promotion / Calibration Panels

Comparative Case Analysis

Side-by-side case analysis comparing promotion candidates against shared criteria, highlighting evidence strength, gaps, and calibration themes.

ABOUT THIS DOCUMENT

This is a **sample** deliverable from the **Promotion / Calibration Panels** workflow (HR13) in AGASI AiOS. It shows the expected structure and tone. All names, numbers, and facts are **fictional**.

Comparative Case Analysis

Cycle: Current promotion review **Organisation:** Northbridge Advisory Partners **Prepared By:** HR Business Partner, People & Culture (with GenAI drafting assistance) **Date:** Current panel analysis date **Confidentiality:** Internal — Restrict Access

This analysis places all four promotion candidates side by side against the six promotion criteria from the Northbridge Promotion Criteria Framework (current criteria version). Evidence is drawn exclusively from the submitted performance review packs.

Criterion 1: Technical / Functional Excellence

Candidate	Proposed Level	Strength	Key Evidence Summary
Senior Data & AI Consultant → Principal Consultant	Principal Consultant	Strong	Architecture options paper approved with minor comments; vector database evaluation informed client technology selection; implementation report rated 4.5/5.0 by Client Technical Lead. One deliverable omission (fallback strategy) caught by client and remediated within 48 hours. Client satisfaction 4.3/5.0 on GenAI pilot.
Senior Management Consultant → Principal Consultant	Principal Consultant	Strong	Led post-acquisition integration programme for logistics client — delivered final operating model 2 weeks ahead of schedule. Client NPS contribution: 72. No rework reported on deliverables.
Senior Cloud Infrastructure Engineer → Lead Engineer	Lead Engineer	Strong	Led cloud migration for financial services client — 47 workloads migrated with 99.8% uptime during cutover. Post-migration cost reduction: 22% against baseline.
Engagement Manager → Senior Engagement Manager	Senior Engagement Manager	Strong	Managed three concurrent engagements totalling \$1.2M in the current review half. All three delivered on time. Client satisfaction average: 4.4/5.0.

Observation: All four candidates demonstrate Strong evidence on Technical / Functional Excellence. This criterion does not differentiate cases in this cycle.

Criterion 2: Stakeholder & Client Management

Candidate	Strength	Key Evidence Summary
Senior Data & AI Consultant	Partial	Client satisfaction 4.3/5.0; strong working-level relationships. However, steering committee presentation ran 8 minutes over allocated time and a data residency question was deferred to the engagement lead. VP of Technology feedback: "Steering presentations could be tighter." Cross-practice networking not pursued.
Senior Management Consultant	Strong	Presented quarterly business reviews to logistics client COO with no escalations. Coordinated cross-practice staffing with Data & AI Advisory. No negative stakeholder feedback recorded.
Senior Cloud Infrastructure Engineer	Strong	Managed weekly syncs with client CTO office. Security classification escalation handled within SLA. Client Infrastructure Lead feedback: "Trusted partner for our cloud decisions."
Engagement Manager	Strong	Presented at two client executive steering committees with no escalations. Secured approval for scope extension on manufacturing analytics engagement (\$85K incremental).

Observation: Three candidates are Strong; the Senior Data & AI Consultant is Partial due to the steering committee over-run and deferred question, which the VP of Technology specifically flagged.

Criterion 3: Business Development & Commercial Contribution

Candidate	Strength	Key Evidence Summary
Senior Data & AI Consultant	No Evidence	One proposal contribution (retail data strategy) requiring two revision rounds. No second contribution. Follow-on opportunity flagged but not formally pursued. Under the current two-proposal threshold (two proposals required), this candidate does not meet the criterion.

Candidate	Strength	Key Evidence Summary
Senior Management Consultant	Strong	Two proposal contributions: logistics client extension (\$340K, won) and financial services operating model diagnostic (\$180K, shortlisted). Meets the two-proposal threshold.
Senior Cloud Infrastructure Engineer	Partial	One proposal contribution (healthcare infrastructure assessment, \$120K, won). Identified managed services upsell but did not advance to proposal stage. One contribution falls short of the two-proposal threshold.
Engagement Manager	Strong	Three proposal contributions: manufacturing analytics extension (\$85K, won), retail predictive maintenance (\$210K, won), public sector data strategy (\$150K, pending). Pipeline contribution: \$295K won, \$150K pending.

Observation: The current two-proposal threshold affects two candidates. The Senior Data & AI Consultant has No Evidence against the current threshold. The Senior Cloud Infrastructure Engineer falls to Partial with one contribution.

Criterion 4: Knowledge Sharing & Internal Contribution

Candidate	Strength	Key Evidence Summary
Senior Data & AI Consultant	Partial	One brown-bag session (4.2/5.0, 14 attendees) in the first half of the review period. No formal session in the second half. Three informal mentoring sessions not formalised. Falls short of the two-contribution threshold.
Senior Management Consultant	No Evidence	No formal knowledge-sharing sessions delivered. No published case studies or methodology contributions. Informal mentoring noted but undocumented.
Senior Cloud Infrastructure Engineer	Strong	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.
Engagement Manager	Partial	One case study published (manufacturing analytics). No brown-bag sessions. Self-assessment notes a preference for written over verbal knowledge sharing. Falls short of the two-contribution threshold.

Observation: Only the Senior Cloud Infrastructure Engineer is Strong on this criterion. The Senior Management Consultant has No Evidence, which is notable given the proposed Principal Consultant level.

Criterion 5: Leadership & Team Development

Candidate	Strength	Key Evidence Summary
Senior Data & AI Consultant	Partial	Peer feedback notes helpfulness outside project hours and strong technical communication. No evidence of formal delegation or coaching actions. Cross-practice visibility is limited per self-assessment.
Senior Management Consultant	Strong	Peer feedback references effective project management without micromanaging. Mid-project onboarding of a new team member described as "seamless — clear RACI, well-organised shared drive."
Senior Cloud Infrastructure Engineer	Partial	Formal mentoring agreement documented (positive). However, peer feedback notes: "defaults to doing the work rather than delegating to the team." Mixed signal on delegation.
Engagement Manager	Partial	360-degree feedback initiated but summary not included in the review pack (flagged by HR Business Partner as incomplete submission). Peer feedback: "Could involve the team more in client decisions — sometimes we learn about direction changes after the fact." Manager narrative notes a "tendency to hold decisions close."

Observation: Only the Senior Management Consultant is Strong. Three candidates are Partial, with the Engagement Manager's case weakened by the missing 360-degree feedback summary.

Criterion 6: Professional Development & Growth Trajectory

Candidate	Strength	Key Evidence Summary
Senior Data & AI Consultant	Strong	Azure AI Engineer Associate (AZ-102) achieved in the second half of the review period (second attempt). Learning budget used appropriately. Development plan discussion with L&D Manager outstanding but scheduled.

Candidate	Strength	Key Evidence Summary
Senior Management Consultant	Partial	One of two planned electives completed (Advanced Facilitation). Second elective (Financial Modelling for Consultants) deferred to the next plan quarter. Meets one certification but not the full planned programme.
Senior Cloud Infrastructure Engineer	Strong	AWS Solutions Architect Professional certification achieved on first attempt in the review period. Security specialisation elective completed ahead of schedule.
Engagement Manager	Strong	Completed Negotiation Skills for Senior Leaders programme. 360-degree feedback process initiated and results received (though not shared with the panel).

Observation: Three candidates are Strong. The Senior Management Consultant is Partial due to the deferred elective.

Summary Heat Map

Candidate	C1: Technical	C2: Stakeholder	C3: Business Dev	C4: Knowledge	C5: Leadership	C6: Prof Dev	Strong Count
Senior Data & AI Consultant	S	P	N	P	P	S	2 of 6
Senior Management Consultant	S	S	S	N	S	P	4 of 6
Senior Cloud Infrastructure Engineer	S	S	P	S	P	S	4 of 6
Engagement Manager	S	S	S	P	P	S	4 of 6

Key: S = Strong, P = Partial, N = No Evidence

Notes for Panel

- The Business Development criterion threshold was updated in the current criteria refresh (from one to two proposals). Candidates 1 and 3 are materially affected by the timing of this change. The panel should confirm whether the updated threshold applies retroactively to review periods that started before that refresh.
- Candidate 4 (Engagement Manager) has an incomplete review pack — the 360-degree feedback summary is missing. This affects the reliability of the Leadership & Team Development assessment.
- Rating scale inconsistencies between practices (noted in the compilation) do not directly affect this analysis, which uses the Promotion Criteria Framework's Strong / Partial / No Evidence scale. However, the panel should be aware that the "Exceeds" rating in the review packs maps approximately to Strong, not definitively.