

HR13 · STEP 5 · FINAL

Promotion / Calibration Panels

Promotion Panel Outcomes

Final calibrated decision set with promotion outcomes, rationale, and follow-up notes aligned to panel governance and criteria.

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**.

Promotion Panel Outcomes

Cycle: Current promotion review **Organisation:** Northbridge Advisory Partners **Panel Date:** Current panel cycle **Panel Chair:** HR Director, People & Culture **Facilitator:** HR Business Partner, People & Culture **Voting Panel Members:** Practice Head, Strategy & Operations; Practice Head, Technology Advisory; L&D Manager, People Development **Confidentiality:** Internal — Restrict Access

This document records the final promotion decisions for the current calibration panel. Each candidate section includes the final decision, evidence summary, acknowledged gaps, panel rationale, and next steps. The Decisions Summary Table at the end provides a consolidated view.

Candidate 1 — Senior Data & AI Consultant → Principal Consultant

Final Decision: Defer with Development Plan

Evidence Summary: The Senior Data & AI Consultant demonstrated Strong evidence on Technical Excellence (implementation report rated 4.5/5.0, architecture options paper approved, vector database evaluation informed client technology selection) and Professional Development (Azure AI Engineer Associate certification achieved). Client satisfaction of 4.3/5.0 on the GenAI pilot confirms reliable working-level delivery.

Gaps Acknowledged: Business Development is the most significant gap — one proposal contribution with two revision rounds and no second contribution, falling below the current two-proposal threshold. Stakeholder Management is Partial due to the steering committee over-run and deferred data residency question. Knowledge Sharing dropped in the second half of the review period with no formal session delivered. Leadership evidence is limited to informal helpfulness with no documented delegation or coaching.

Panel Rationale: The draft recommendation was "Do Not Promote" based on 2 of 6 criteria rated Strong, which maps to "Not Ready" under the framework. The panel discussed the nominating manager's argument that the onboarding period (mid-year start) constrained commercial contribution opportunities. The panel agreed that the technical delivery quality justifies investment in a structured development plan rather than a flat rejection. The vote was 2–1 in favour of Defer, with the dissenting panel member (Practice Head, Strategy & Operations) noting that Business Development is a non-negotiable capability at Principal level and a 90-day plan may not be sufficient.

Next Steps: HR Business Partner and Practice Head, Data & AI Advisory to agree a 90-day development plan before the next review checkpoint, focusing on: (1) assignment as a named proposal contributor on two near-term opportunities, with first-draft review from a senior colleague; (2) executive presentation coaching session arranged through L&D Manager; (3) formalisation of the junior analyst mentoring relationship. Re-review eligible at the next panel cycle.

Candidate 2 — Senior Management Consultant → Principal Consultant

Final Decision: Promote

Evidence Summary: The Senior Management Consultant demonstrated Strong evidence on four of six criteria: Technical Excellence (post-acquisition integration delivered 2 weeks early, client NPS contribution 72), Stakeholder Management (quarterly business reviews to client COO with no escalations, cross-practice coordination), Business Development (two proposals, \$340K logistics extension won, \$180K diagnostic shortlisted), and Leadership (peer feedback on effective project management, seamless mid-project onboarding of new team member).

Gaps Acknowledged: Knowledge Sharing is rated No Evidence — no formal sessions, publications, or documented mentoring. Professional Development is Partial with one of two planned electives completed. The Knowledge Sharing gap is the most material concern: at Principal Consultant level, contributing to the practice's collective capability is a stated expectation.

Panel Rationale: The draft recommendation was "Promote" based on 4 of 6 criteria rated Strong with no unresolvable gaps. The panel discussed the Knowledge Sharing gap at length. The L&D Manager noted that the candidate's delivery track record suggests capability that has not been channelled into internal contribution, and that a post-promotion expectation rather than a pre-promotion gate is appropriate here. The Panel Chair confirmed that the framework's readiness threshold (Strong on at least 4 of 6, no No Evidence with a documented plan) allows promotion with a development commitment. The vote was 3–0 in favour of Promote, conditional on a documented knowledge-sharing commitment.

Next Steps: Promotion effective at the start of the next plan quarter. The nominating manager will set an explicit expectation for two knowledge-sharing contributions (sessions or published materials) in the first six months post-promotion. The deferred Financial Modelling elective should be completed by the end of that plan quarter. HR Business Partner to confirm documentation of the knowledge-sharing commitment in the candidate's objectives.

Candidate 3 — Senior Cloud Infrastructure Engineer → Lead Engineer

Final Decision: Promote

Evidence Summary: The Senior Cloud Infrastructure Engineer demonstrated Strong evidence on four of six criteria: Technical Excellence (47-workload cloud migration at 99.8% uptime, 22% post-migration cost reduction), Stakeholder Management (weekly client CTO office syncs, security escalation within SLA, "trusted partner" client feedback), Knowledge Sharing (two highly-rated brown-bag sessions, published multi-cloud networking runbook, formal mentoring agreement), and Professional Development (AWS Solutions Architect Professional first-attempt pass, security specialisation ahead of schedule).

Gaps Acknowledged: Business Development is Partial — one proposal contribution won (\$120K) but the managed services upsell was identified and not progressed. The nominating manager specifically noted the candidate "waited for the Engagement Manager to initiate." Leadership & Team Development is Partial due to the peer feedback pattern of doing work rather than delegating to the team, which contradicts the delegation expectation for Lead Engineer.

Panel Rationale: The draft recommendation was "Promote" based on 4 of 6 criteria rated Strong. The panel flagged the inconsistency between Knowledge Sharing (Strong) and Leadership (Partial) — sharing knowledge through sessions is valuable, but Lead Engineer requires empowering team members through delegation. The Practice Head, Technology Advisory acknowledged this gap and committed to addressing it through a team leadership coaching engagement in the next plan quarter. The panel also noted that the Business Development gap is common among engineer-track promotions and agreed that the candidate's technical credibility provides a platform for commercial contribution with targeted support. The vote was 3–0 in favour of Promote.

Next Steps: Promotion effective at the start of the next plan quarter. Practice Head, Technology Advisory to arrange a team leadership coaching programme focused on delegation and team leverage. The candidate should be paired with an Engagement Manager on at least one near-term proposal to build commercial muscle. HR Business Partner to document the delegation development commitment.

Candidate 4 — Engagement Manager → Senior Engagement Manager

Final Decision: Defer with Development Plan

Evidence Summary: The Engagement Manager demonstrated Strong evidence on four of six criteria: Technical Excellence (\$1.2M managed across three concurrent engagements, all on time, 4.4/5.0 client satisfaction), Stakeholder Management (two executive steering committees with no escalations, \$85K scope extension), Business Development (three proposals, \$295K won, \$150K pending — strongest pipeline contribution in the practice), and Professional Development (Negotiation Skills programme completed, 360-degree feedback initiated).

Gaps Acknowledged: Knowledge Sharing is Partial — one case study published but no sessions or methodology contributions. Leadership & Team Development is Partial — peer feedback and the manager narrative both flag a pattern of centralising decisions rather than empowering team leads. The 360-degree feedback summary was not included in the review pack, which the HR Business Partner flagged as an incomplete submission.

Panel Rationale: The draft recommendation was "Promote" based on 4 of 6 criteria rated Strong. However, the panel deviated from the draft after extended discussion. The Panel Chair raised two concerns: (1) the missing 360-degree feedback summary means the Leadership assessment is based on incomplete evidence, and at Senior Engagement Manager level, team empowerment is a critical capability, not a development nice-to-have; (2) the delegation concern has appeared in two previous review cycles according to the manager narrative, suggesting this is a persistent pattern rather than a recent gap. The L&D Manager supported deferral, noting that promoting while the same development area has been flagged across three cycles sends the wrong signal. The vote was 2–1 in favour of Defer, with the dissenting panel member (Practice Head, Technology Advisory) arguing that the commercial performance is exceptional and the delegation gap can be addressed post-promotion.

Next Steps: HR Business Partner to obtain the missing 360-degree feedback summary within 10 business days and add it to the candidate's file. Practice Head, Data & AI Advisory and the candidate to agree a 90-day development plan before the next review checkpoint focused on: (1) completing and sharing the 360-degree feedback results with the HR Business Partner; (2) implementing a documented delegation protocol on the next engagement (team leads make at least two client-facing decisions per week without escalation to the Engagement Manager); (3) delivering one brown-bag session on engagement management or client development methodology. Re-review eligible at the next panel cycle with the complete 360-degree feedback and evidence of delegation behaviour change.

Decisions Summary Table

Candidate	Current Level	Proposed Level	Final Decision	Changed from Draft?	Key Rationale
Senior Data & AI Consultant	Senior Consultant	Principal Consultant	Defer with Development Plan	Yes — changed from Do Not Promote	Technical quality justifies investment; onboarding timing constrained BD opportunities. 90-day plan to address BD, executive communication, and knowledge sharing.
Senior Management Consultant	Senior Consultant	Principal Consultant	Promote	No	4 of 6 Strong; knowledge-sharing gap addressed via post-promotion commitment.
Senior Cloud Infrastructure Engineer	Senior Engineer	Lead Engineer	Promote	No	4 of 6 Strong; delegation gap to be addressed through coaching. Commercial contribution to be developed with Engagement Manager pairing.
Engagement Manager	Engagement Manager	Senior Engagement Manager	Defer with Development Plan	Yes — changed from Promote	Incomplete 360 evidence; persistent delegation concern across 3 review cycles warrants pre-promotion resolution. 90-day plan with delegation protocol and knowledge-sharing requirement.

Panel Attestation

The decisions recorded in this document reflect the calibration panel's majority vote for each candidate. Dissenting views have been documented in the individual candidate sections. This document is pending review and sign-off by the Panel Chair (HR Director) within 48 hours per the Panel Governance Guidelines.

Panel Chair Sign-Off: *Pending* **Date:** *Pending*