

Critical Role Registry

Organisation: Northbridge Advisory Partners **Extract Date:** Current succession planning extract **Source:** HRIS Role Classification Module **Prepared By:** HRIS Administrator, HR Systems **Confidentiality:** Internal - Restrict Access

This registry identifies roles classified as critical for business continuity at Northbridge Advisory Partners. Roles are included based on leadership nomination and annual workforce planning input. The registry is scheduled for annual review; last full review was completed in the prior annual review cycle.

Registry Summary

Role ID	Role Title	Department	Business Criticality	Current Incumbent Tenure	Vacancy Risk	Succession Status	Last Reviewed
CR-1	Practice Head, Data & AI Advisory	Data & AI Advisory	Essential	7 years	Near-term	Pipeline under review	Current review cycle
CR-2	Director of Client Delivery	Client Delivery	Very High	3 years	Imminent	No documented successor	Current review cycle
CR-3	Head of Technology Advisory	Technology Advisory	High	11 years	Planned	Informal successor identified	
CR-4	Head of People Operations	People Operations	Critical	5 years	Unknown	Not assessed	Prior review cycle

Role Detail

CR-1: Practice Head, Data & AI Advisory

- **Department:** Data & AI Advisory
- **Reports To:** Managing Partner
- **Business Criticality:** Essential
- **Rationale for Criticality:** Owns the firm's largest revenue-generating practice (\$14.2M annual revenue). Sole executive sponsor for the managed services contract won in a prior year. Departure without a prepared successor would disrupt three active client engagements and the practice P&L.
- **Key Accountabilities:** Practice P&L management, client advisory leadership, business development pipeline for data and AI services, talent development within the practice.
- **Vacancy Risk:** Near-term. The current incumbent has communicated interest in a portfolio advisory role within 18-24 months.
- **Current Succession Status:** Pipeline under review. Two internal candidates have been discussed informally but no formal readiness assessment has been conducted.
- **Last Reviewed:** Current review cycle

CR-2: Director of Client Delivery

- **Department:** Client Delivery
- **Reports To:** Chief Operating Officer
- **Business Criticality:** Very High
- **Rationale for Criticality:** Oversees delivery execution across all six practices. The role coordinates resource allocation, engagement quality, and client escalation protocols. During the three post-acquisition integration projects, this role was the single point of coordination between legacy and acquired delivery teams.
- **Key Accountabilities:** Multi-engagement delivery oversight, client relationship management at C-suite level, commercial negotiation on scope changes, cross-practice resource coordination, delivery team leadership.
- **Vacancy Risk:** Imminent. The current incumbent has accepted an external offer with a 60-day notice period starting in the current exit window (date on file).
- **Current Succession Status:** No documented successor. The COO has requested an accelerated succession review.
- **Last Reviewed:** Current review cycle

CR-3: Head of Technology Advisory

- **Department:** Technology Advisory
- **Reports To:** Managing Partner
- **Business Criticality:** High
- **Rationale for Criticality:** Leads the cloud, infrastructure, and security advisory practice. Key client relationships in the financial services sector depend on the incumbent's personal credibility. Practice revenue is \$8.7M with a growing managed services component.
- **Key Accountabilities:** Technology strategy direction, cloud and infrastructure advisory leadership, practice development, key client stakeholder management, technical talent pipeline.
- **Vacancy Risk:** Planned. The incumbent has indicated a 3-5 year horizon before transition but has requested that succession planning begin now.
- **Current Succession Status:** Informal successor identified. The incumbent has mentioned the recently promoted Lead Engineer as a potential successor but no formal assessment exists.
- **Notes:** The last formal review date for this entry is missing from the HRIS extract. The HRIS Administrator has flagged this as a data migration gap from the legacy system upgrade.
- **Last Reviewed:** *Not recorded*

CR-4: Head of People Operations

- **Department:** People Operations
- **Reports To:** HR Director, People & Culture
- **Business Criticality:** Critical
- **Rationale for Criticality:** Manages employee relations casework, HR operations, and policy governance for all 680 employees. The role is the escalation point for sensitive ER cases and the owner of nine overdue policy reviews flagged in the most recent compliance audit.
- **Key Accountabilities:** HR operations leadership, employee relations case management, policy governance and review cycle, HRIS process ownership, compliance reporting.
- **Vacancy Risk:** Unknown. No succession conversation has been initiated. The incumbent has not indicated plans to leave.
- **Current Succession Status:** Not assessed. The HR Director has noted this role should be included in the succession planning cycle but no action has been taken.
- **Last Reviewed:** Prior review cycle

Data Quality Notes

1. CR-3 is missing a "Last Reviewed" date due to an incomplete data migration from the legacy HRIS. The HRIS Administrator estimates the last review occurred two quarters earlier but cannot confirm.
2. CR-4 uses the criticality label "Critical" which does not match the approved three-tier scale (High / Very High / Essential). This entry was created before the current classification update and has not been reclassified.
3. The vacancy risk for CR-2 was updated manually by the COO's office outside the standard review cycle (date on file) outside the standard review cycle. The HRIS record still shows the previous risk level ("Planned") in some report views.