Succession Action Recommendations

Organisation: Northbridge Advisory Partners **Assessment Date:** Current succession review cycle **Prepared For:** HR Director, People & Culture; Talent Management Lead **Confidentiality:** Internal - Restrict Access

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CR-2 — Director of Client Delivery

- **Gap Severity**: High
- **Immediate Action**: Establish an acting Director arrangement with the Principal Consultant, Strategy & Operations effective upon the current incumbent's departure, with a formal handover plan covering the three post-acquisition integration coordination responsibilities and client escalation protocols.
- **Development Actions**:
  - Stretch Assignment — Assign the Principal Consultant as shadow lead on one executive steering committee for a current engagement during the remaining notice period to build Director-level client relationship exposure.
  - Targeted Training — Enrol the Principal Consultant in the Financial Modelling elective (already deferred from prior plan commitments) to strengthen analytical capability required for resource allocation decisions.
  - Cross-Functional Exposure — Include the Principal Consultant in the next cross-practice resource planning sessions to build familiarity with the full delivery portfolio, not just the Strategy & Operations practice.
- **Acceleration Option**: If the current incumbent departs before the handover plan is complete, the COO should serve as interim co-lead alongside the acting Director for the first 30 days to ensure client continuity on active escalations.
- **Timeline**: Immediate transition within 60 days (aligned with incumbent notice period). Target full readiness within 6 months post-appointment.
- **Success Indicator**: The acting Director manages at least one cross-practice resource allocation cycle and one client escalation independently with documented outcomes.

CR-1 — Practice Head, Data & AI Advisory

- **Gap Severity**: High
- **Immediate Action**: Formalise the Principal Consultant, Strategy & Operations as the identified successor for this role and initiate a structured practice leadership exposure programme. If the Principal Consultant is deployed to CR-2 (Director of Client Delivery), escalate CR-1 to the Talent Management Lead for an external pipeline or alternative internal candidate identification.
- **Development Actions**:
  - Mentoring — Pair the successor candidate with the current Practice Head, Data & AI Advisory for monthly practice strategy discussions covering P&L management, client portfolio decisions, and headcount planning.
  - Stretch Assignment — Assign the successor to lead one business development pursuit in the Data & AI practice during the subsequent plan quarter, with the current Practice Head as advisor rather than lead.
  - Knowledge Sharing — The successor must deliver two knowledge-sharing sessions (committed as a post-promotion requirement from the current promotion panel) within the Data & AI practice rather than their home practice, building visibility and credibility with the team they would lead.
- **Acceleration Option**: If the current Practice Head's transition timeline accelerates to under 12 months, initiate a parallel external search to build a competitive slate while the internal candidate continues development.
- **Timeline**: 18-month development sprint targeting Ready Now status by end of long-range development window, aligned with the incumbent's communicated 18-24 month transition interest.
- **Success Indicator**: The successor independently leads one Data & AI business development pursuit from proposal to decision, and receives positive feedback from at least two Data & AI practice team members on leadership credibility.

CR-3 — Head of Technology Advisory

- **Gap Severity**: Moderate
- **Immediate Action**: Formalise the Lead Engineer, Technology Advisory as the identified successor and convert the incumbent's informal endorsement into a documented development agreement with milestone reviews.
- **Development Actions**:
  - Coaching — Continue the team leadership coaching programme committed at the current promotion panel, with specific delegation targets (team leads making at least two client-facing decisions per week without escalation, per the promotion panel's recommendation).
  - Stretch Assignment — Pair the Lead Engineer with an Engagement Manager on at least two proposals spanning the next two plan quarters to build commercial contribution skills. The first proposal should involve the Lead Engineer drafting the technical scope and pricing section.
  - Cross-Functional Exposure — Include the Lead Engineer in one quarterly client portfolio review with the Managing Partner to build practice-level strategic awareness beyond technical delivery.
- **Acceleration Option**: If the incumbent's planned 3-5 year horizon shortens, the Lead Engineer should transition to a Deputy Head arrangement with shared client relationship ownership for the top three financial services accounts.
- **Timeline**: 24-month development sprint targeting Ready Now status by end of extended development window, within the incumbent's indicated timeline.
- **Success Indicator**: The Lead Engineer leads one proposal end-to-end with documented commercial outcome, and peer feedback confirms sustained delegation behaviour change over two consecutive quarters.

CR-4 — Head of People Operations

- **Gap Severity**: Moderate
- **Immediate Action**: Conduct a formal vacancy risk assessment with the current incumbent and HR Director to determine whether succession urgency exists. Update the Critical Role Registry entry to use the approved criticality scale and a current review date.
- **Development Actions**:
  - Targeted Training — Address the Senior HR Business Partner's HRIS proficiency gap through a structured learning programme on the HRIS reporting and analytics modules, co-designed with the HRIS Administrator.
  - Stretch Assignment — Assign the Senior HR Business Partner to lead one of the nine overdue policy reviews end-to-end (rather than contributing to reviews led by others) to build policy governance leadership evidence.
  - Mentoring — Establish a formal mentoring arrangement between the current Head of People Operations and the Employee Relations Specialist to broaden the specialist's exposure beyond ER casework into HR operations and stakeholder management.
- **Acceleration Option**: If a vacancy materialises before either candidate reaches Ready 1-2 Years, the HR Director should consider a shared leadership arrangement with the Senior HR Business Partner covering operations and the Employee Relations Specialist covering ER casework until a permanent appointment is made.
- **Timeline**: 12-month development sprint for the Senior HR Business Partner to move from Development Needed to Ready 1-2 Years. 24-month horizon for the Employee Relations Specialist.
- **Success Indicator**: The Senior HR Business Partner completes one policy review independently with sign-off from the HR Director, and demonstrates HRIS reporting proficiency by producing one quarterly compliance report without HRIS Administrator assistance.