

Organisational Assessment Rubric

External Domains

Domain	Attribute	1 – Emerging	2 – Developing	3 – Established	4 – Advanced	5 – Leading / Benchmark
Sector Authority	Experience	Limited sector exposure; ad hoc involvement	Early experience in defined sector niches	Regular sector engagement with some thought pieces	Recognised contributor to sector discourse	Widely recognised authority shaping sector agenda
	Track Record	Few or no documented sector achievements	Some successful projects in sector	Consistent delivery of sector projects	Demonstrated success and client retention	Proven legacy of sector innovation & leadership
	Knowledge & Skill	Basic sector understanding	Moderate depth of sector insight	Strong practical expertise	Deep applied knowledge across multiple sector contexts	Exceptional, research-backed insights influencing best practice
	Credibility & Reputation	Low recognition; limited trust	Building credibility among peers	Recognised by clients and sector stakeholders	Trusted advisor with strong peer recognition	Industry benchmark and preferred reference point
Client Relationships	Experience	Limited direct client interaction	Some exposure to client advisory	Regular engagement with recurring clients	Deep, trusted client partnerships	Strategic advisor status with long-term alliances
	Track Record	Few client success stories	Some client testimonials and renewals	Regular delivery on client value	Measurable impact on client business outcomes	Documented transformation of

						client performance and strategy
Technical & Advisory Expertise	Knowledge & Skill	Basic understanding of client needs	Growing ability to anticipate client issues	Strong understanding of client ecosystems	Proactively co-developing client strategies	Deep client empathy driving co-created innovation
	Credibility & Reputation	Low client visibility	Emerging client credibility	Recognised by clients for quality and consistency	Strong reputation for partnership excellence	Widely recognised as trusted industry advisor
	Experience	Limited technical experience	Building technical exposure through projects	Consistent application of methods and frameworks	Advanced and innovative technical capability	Recognised global expert setting technical standards
	Track Record	Few technical achievements	Some project-level success	Consistent delivery of quality outputs	Evidence of measurable performance improvement	Proven record of transformative technical impact
	Knowledge & Skill	Basic technical competence	Intermediate proficiency	High proficiency with emerging specialisations	Deep subject-matter mastery	Global thought leader with proprietary know-how
	Credibility & Reputation	Limited external recognition	Growing internal and client credibility	Recognised for reliability and accuracy	Respected advisor for advanced technical challenges	Widely cited expert influencing industry direction

Branding & Visibility	Experience	Limited brand recognition	Initial brand-building activities	Consistent brand presence in niche markets	Strong cross-sector recognition	Highly visible and aspirational brand in target sectors
	Track Record	Minimal brand campaigns or impact	Some visibility from marketing efforts	Recognised in selected networks or media	Regular presence in high-profile platforms	Market-leading brand synonymous with excellence
	Knowledge & Skill	Basic marketing and communication understanding	Developing content and PR skills	Strong marketing alignment with brand values	Integrated brand strategy using data and insight	Brand narrative driven by authentic thought leadership
	Credibility & Reputation	Low awareness and credibility	Growing reputation and following	Recognised for credible insights and expertise	Respected brand and consistent voice	Trusted, influential brand with enduring authority

Internal Domains

Internal Domain	Criterion	1 – Minimal	2 – Developing	3 – Competent	4 – Advanced	5 – Leading / Best-in-Class
Methodology & Process	Capability	Processes are ad hoc and ineffective; staff lack necessary skills.	Basic processes exist; staff apply them inconsistently.	Standard processes applied effectively; staff competent.	Processes well-designed, efficient, and widely understood by staff.	Highly capable processes; staff are experts; methods drive innovation and superior outcomes.
	Consistency	Processes applied sporadically; outcomes vary.	Applied inconsistently across projects or teams.	Applied consistently in most projects.	Consistently applied across firm; monitored for deviations.	Universally applied; firm-wide adherence; outcomes highly reliable.
	Scalability	Processes cannot be scaled beyond current teams/projects.	Limited ability to scale; some bottlenecks.	Processes can be scaled with minor adjustments.	Processes scalable across multiple teams/projects efficiently.	Fully scalable; easily adapted for growth or new contexts without loss of quality.
	Knowledge Codification	Little or no documentation; knowledge resides in individuals.	Some documentation exists but incomplete or inaccessible.	Processes documented and accessible for staff use.	Processes codified systematically; knowledge leveraged across teams.	Knowledge fully institutionalized; continuously updated, shared, and used strategically.
	Alignment with Values	Processes rarely reflect firm's values.	Some alignment with values.	Processes generally align with values.	Strong alignment with firm's values.	Processes embody values; culture, reinforce

			inconsistently applied.	applied in most cases.	monitored and reinforced.	ethics, and sustainability throughout the firm.
Relationships & Networks	Capability	Collaboration minimal; staff lack teamwork skills.	Basic collaboration; skills applied inconsistently.	Teams collaborate effectively; staff competent in networking.	Strong collaboration; networks enhance problem-solving and innovation.	Highly capable teams; networks fully leveraged for innovation and firm performance.
	Consistency	Collaboration sporadic; outcomes unpredictable.	Occasional collaboration; inconsistent results.	Reliable collaboration in most contexts.	Systematic collaboration across teams; outcomes predictable.	Fully embedded collaboration; consistently drives innovation and results.
	Scalability	Networks cannot support larger or new teams/projects.	Limited scalability; some bottlenecks in team expansion.	Networks can scale with minor adjustments.	Collaboration networks scalable across multiple teams/projects.	Fully scalable networks; easily expand without loss of effectiveness or culture.
	Knowledge Codification	Knowledge shared informally; rarely documented.	Some knowledge sharing; inconsistent.	Knowledge systematically documented and shared.	Codified knowledge used to support collaboration and learning.	Networks systematically capture, codify, and leverage knowledge firm-wide.
	Alignment with Values	Collaboration rarely reflects firm culture or values.	Some alignment; inconsistently applied.	Generally aligns with culture and values.	Collaboration strongly reinforces culture, ethics, and sustainability.	Fully aligned with firm values; collaboration exemplifies culture and ethical standards.

Data & Technology	Capability	Minimal data or technology usage; staff lack skills.	Basic tools used; limited staff competence.	Data and technology used effectively; staff competent.	Technology integrated; staff skilled in analytics and tools.	Leading-edge technology; staff experts; drives innovation and strategic advantage.
	Consistency	Technology applied sporadically; outcomes vary.	Inconsistent application across teams/projects.	Applied consistently in most projects.	Firm-wide consistent use; monitored regularly.	Universally applied; highly reliable and integrated across all operations.
	Scalability	Systems cannot support growth or new contexts.	Limited scalability; some constraints.	Technology can scale with minor adjustments.	Systems scalable across teams/projects efficiently.	Fully scalable; supports firm growth, new projects, and markets without loss of performance.
	Knowledge Codification	Data and tech knowledge siloed or undocumented.	Some documentation exists; incomplete.	Knowledge documented and accessible.	Knowledge systematically codified and leveraged across teams.	Knowledge fully institutionalized; continuously updated and strategically applied.
	Alignment with Values	Tech use rarely reflects ethical standards or sustainability.	Some alignment; inconsistently applied.	Generally aligns with values.	Strong alignment with firm ethics and sustainability; monitored.	Fully aligned; technology and data practices exemplify firm values and ethical standards.

Ethics & Sustainability	Capability	Ethical and sustainable practices minimal; staff unaware.	Basic understanding; inconsistently applied.	Staff competent; practices applied reliably.	High capability; staff guide and mentor others in ethics and sustainability.	Leading capability; practices drive differentiation and industry leadership.
	Consistency	Practices applied inconsistently; outcomes vary.	Sporadic application across teams/projects.	Consistently applied in most areas.	Firm-wide systematic application; monitored.	Fully embedded; universally applied and continuously reinforced.
	Scalability	Cannot be applied beyond small teams/projects.	Limited scalability; difficult to expand.	Practices scalable with minor adjustments.	Firm-wide scalable practices across teams/projects.	Fully scalable; easily extended to new contexts or regions without loss of impact.
	Knowledge Codification	Ethics and sustainability knowledge undocumented.	Some documentation exists; inconsistent.	Knowledge codified and accessible.	Systematically codified and applied to decisions and processes.	Knowledge fully institutionalized; continuously updated and shared firm-wide.
	Alignment with Values	Rarely reflects firm's core values.	Some alignment; inconsistent.	Generally aligns with values.	Strong alignment; reinforces culture, ethics, sustainability.	Fully embodies firm values; central to decision-making, culture, and reputation.