

# Heat Map – Identification of Material Expertise Holders

## Purpose:

To create a structured Heat Map that identifies individuals whose expertise, knowledge, or influence materially contributes to the firm, in order to prioritise them for Stage 2: Detailed Individual Expertise Assessment.

This Heat Map is not a performance evaluation and does not involve numeric scoring.

## 1. Overview of the Heat Map

The Heat Map is a matrix in which:

- Columns represent key material contribution domains
- Rows list the names of individuals within the organisation
- Each individual is placed under one or more columns
- Each placement is assigned a priority level:
  - Higher Priority – shaded Red
  - Medium Priority – shaded Orange
  - Low Priority – shaded Green

The Heat Map visually highlights concentration of critical expertise and dependency risk.

## 2. Heat Map Columns (Contribution Domains)

Create one column for each of the following domains:



Quality & Professional  
Risk



Revenue  
Generation



Specialist/  
Scarce  
Expertise



Tacit/  
Institutional  
Knowledge



### 3. Step-by-Step Instructions

#### Step 1: Assemble the Review Group

- Include Partners, Practice Leads, and Senior Management.
- The group should collectively understand:
  - client delivery,
  - revenue drivers,
  - internal operations,
  - and market positioning.

#### Step 2: Populate Each Column with Names

For each column, ask:




*“Which individuals materially contribute in this domain such that their sustained absence would create risk or loss for the firm?”*

- List individual names only (no titles or grades).
- Individuals may appear in multiple columns.
- Include contractors where dependency is material.

There is no limit at this stage prioritisation comes next.

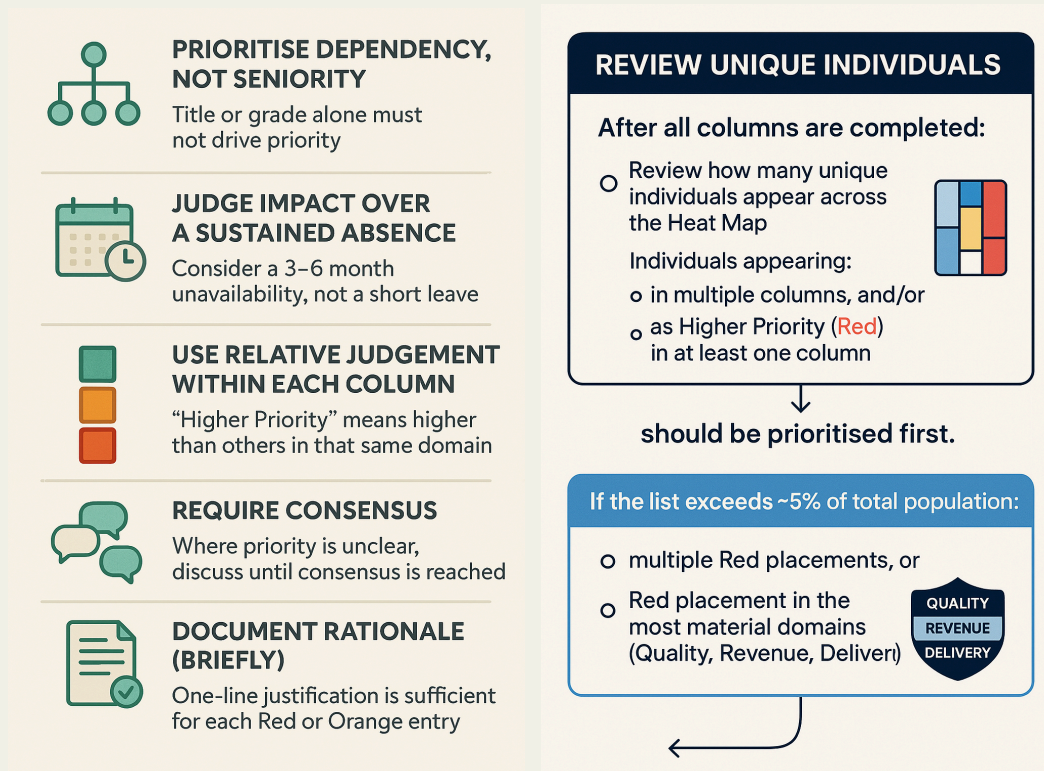
#### Step 3: Priority Classification (Critical Step)

Once individuals are listed under each column, assign a priority level to each individual within that column.

	 <b>Higher Priority (Red)</b>	 <b>Medium Priority (Orange)</b>	 <b>Low Priority (Green)</b>
Criteria	<ul style="list-style-type: none"> <li>• The individual is critical to this domain.</li> <li>• Their absence would cause material disruption, risk, or loss.</li> </ul>	<ul style="list-style-type: none"> <li>• The individual makes a significant contribution.</li> <li>• Some substitution is possible, but with:</li> </ul>	<ul style="list-style-type: none"> <li>• The individual contributes meaningfully, but:               <ul style="list-style-type: none"> <li>- Others can reasonably step in,</li> <li>- Impact of absence is</li> </ul> </li> </ul>

	<ul style="list-style-type: none"> <li>• There is no readily available substitute in the short term.</li> </ul>	<ul style="list-style-type: none"> <li>◦ quality degradation,</li> <li>◦ delays,</li> <li>◦ or increased supervision.</li> </ul>	limited or short-term.
<b>Indicators</b>	<ul style="list-style-type: none"> <li>• Final quality reviewer</li> <li>• Key client rainmaker</li> <li>• Sole or rare specialist</li> <li>• Single point of delivery failure</li> <li>• De facto decision shaper</li> </ul>	<ul style="list-style-type: none"> <li>• Strong contributors supporting a critical role</li> <li>• Specialists with partial overlap</li> <li>• Individuals relied upon regularly but not exclusively</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge is documented or widely shared</li> <li>• Contribution is additive rather than critical</li> </ul>

#### 4. Practical Rules to Ensure Consistency



## 7. Output of Stage 3

The final output should be:

- A completed Heat Map
- A consolidated list of individuals approved to proceed to **Stage 4**
- A short record of rationale supporting inclusion

This ensures the process is:

- transparent,
- defensible,
- aligned with international best practice,
- and suitable for partner governance.

## 8. Important Clarification

This Heat Map:

- Does not rank individuals
- Does not assess performance

- Does not replace appraisals

Its sole purpose is to identify materially critical expertise holders for deeper assessment.

## Individual & Ecosystem Mapping – HEAT MAP

### Quality & Risk Control

Individuals relied upon to review, challenge, or assure the quality of client deliverables, outputs, or advice?

	Rank

### Commercial Impact

Individuals directly influence revenue through client acquisition, retention, or expansion?

	Rank

### Specialist & Scarce Resources

Individual hold unique or hard-to-replace technical or specialist expertise critical to the firm's offerings?

	Rank

### Tacit & Institutional Knowledge

Individual holding deep knowledge about how the firm operates, including undocumented processes, practices, or culture

	Rank

### Contractor Dependency

Contractors which would impact client deliverables materially if unavailable

	Rank

### Market & Sector Insights

Individual providing insights shaping the firm's understanding of clients, markets, or emerging opportunities

	Rank

### Decision Critical Influence

Individual's judgement materially influences high-risk or high-value decisions

	Rank