

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



Market & Sector Insight	Delivery Dependency	Decision Critical Influence
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.

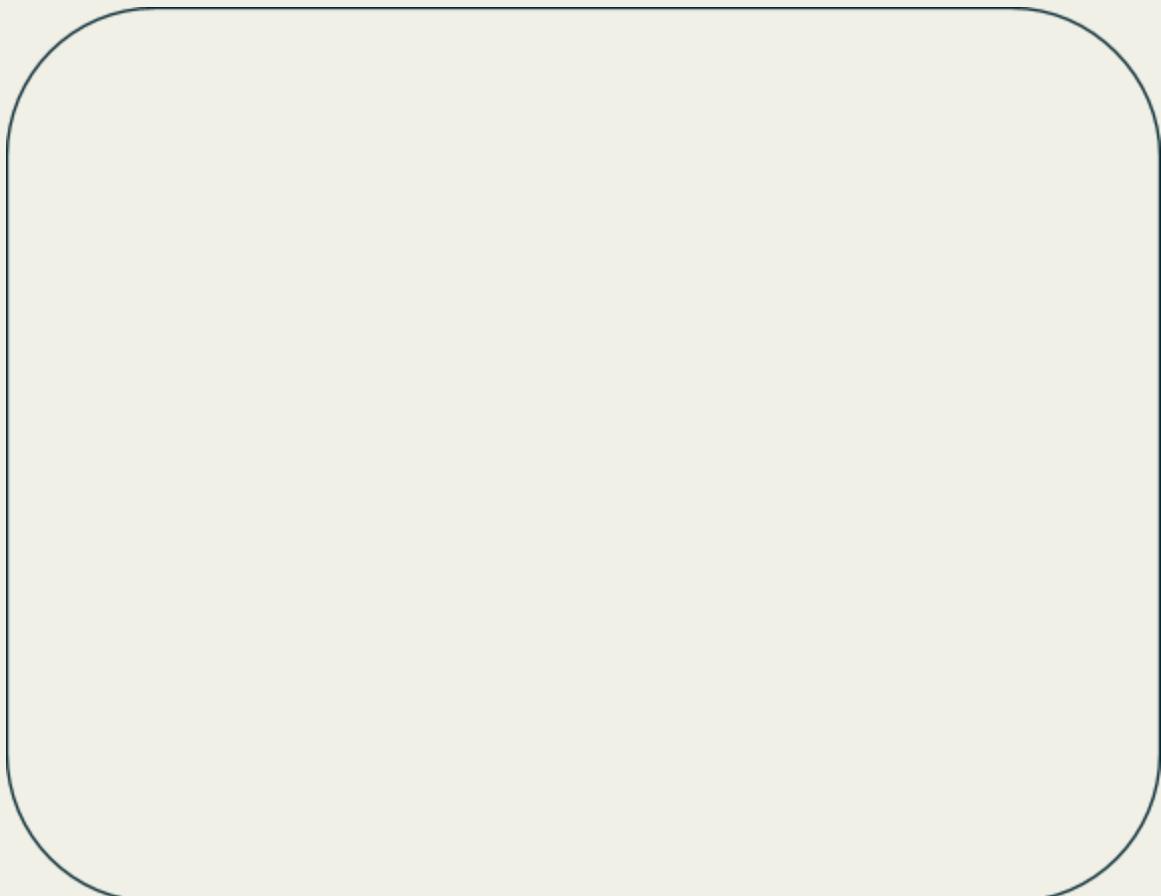
Step 3: Priority Classification (Critical Step)

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

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

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

4. Practical Rules to Ensure Consistency





PRIORITISE DEPENDENCY, NOT SENIORITY

Title or grade alone must not drive priority



JUDGE IMPACT OVER A SUSTAINED ABSENCE

Consider a 3–6 month unavailability, not a short leave



USE RELATIVE JUDGEMENT WITHIN EACH COLUMN

“Higher Priority” means higher than others in that same domain



REQUIRE CONSENSUS

Where priority is unclear, discuss until consensus is reached



DOCUMENT RATIONALE (BRIEFLY)

One-line justification is sufficient for each Red or Orange entry

REVIEW UNIQUE INDIVIDUALS

After all columns are completed:

- Review how many unique individuals appear across the Heat Map
- Individuals appearing:
 - in multiple columns, and/or
 - as Higher Priority (Red) in at least one column



should be prioritised first.

If the list exceeds ~5% of total population:

- multiple Red placements, or
- Red placement in the most material domains (Quality, Revenue, Delivery)



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