

## # Targeted Learning Plan

**Employee Role:** Senior Data & AI Consultant **Department:** Data & AI Advisory — Applied AI Sub-Team **Organisation:** Northbridge Advisory Partners **Plan Period:** Q2 2027 — Q4 2027 **Prepared By:** L&D Manager, People Development (with GenAI drafting assistance) **Reviewed By:** Practice Head, Data & AI Advisory **Date:** 28 January 2027

## Development Summary

Six development actions are planned across a six-month horizon from April to October 2027. The primary focus is on the two high-priority gaps — executive communication and proposal writing — which account for four of the six actions. Medium- and low-priority gaps in knowledge sharing and cross-practice networking are addressed through lightweight, self-directed activities that fit around delivery commitments.

## Employee Alignment Check

Action ID	Preference Alignment	Adjustment Note
ACT-1	Aligned	Employee requested 1:1 coaching with a senior leader who presents to client leadership; CM-01 matches this preference directly.
ACT-2	Adjusted	Employee expressed interest in online self-paced modules for presentation skills; FT-03 (Advanced Data Storytelling) added as a supplementary action to support structured presentation improvement alongside coaching. Employee prefers clear deadlines — a target completion date has been set.
ACT-3	Aligned	Employee specifically requested contributing author exposure on proposals, not just technical input sections. SA-01 matches this.
ACT-4	Aligned	Employee prefers hands-on over classroom. SA-03 provides direct presentation experience under observation rather than a workshop format.
ACT-5	Aligned	Employee expressed interest in joining Data Engineering community of practice sessions. SD-02 participation formalised.
ACT-6	Flagged	Employee did not specifically mention peer mentoring. However, GAP-4 (Cross-Practice Relationship Building) is best served by regular cross-practice contact. SD-02 attendance partially addresses this, but a structured monthly cross-practice check-in is recommended. Employee may prefer 1:1 format — confirm during plan sign-off.

## Learning Plan

Action ID	Objective ID	Development Action	Action Type	Time Frame	Success Indicator	Priority
ACT-1	OBJ-1	Six fortnightly 1:1 coaching sessions with an assigned senior leader focused on structuring steering committee updates and handling live Q&A (CM-01)	Coaching	April — June 2027	Deliver a 15-minute steering update with 5 minutes of Q&A at one active engagement, observed by the coaching senior leader, with no time overrun.	High
ACT-2	OBJ-1	Complete Advanced Data Storytelling self-paced course (FT-03) to strengthen data presentation structure in executive contexts	Self-Directed Learning	April — May 2027	Course completed by 31 May 2027; one steering deck restructured using techniques from the course.	High
ACT-3	OBJ-2	Named contributing author on two client proposals through the Proposal Co-Author Programme (SA-01), paired with a senior consultant experienced in Northbridge proposal standards	Stretch Assignment	May — July 2027	Two proposals submitted with the employee as a named contributor; first-draft revision rounds reduced to one or fewer per proposal compared to the baseline of two.	High
ACT-4	OBJ-2	Deliver two client steering presentations under observation by a senior engagement lead through the Client Steering Presentation Rotation (SA-03)	Stretch Assignment	June — August 2027	Two steering presentations delivered; observer feedback confirms structured delivery and confident Q&A handling.	High
ACT-5	OBJ-3	Attend at least one Community of Practice session per month (SD-02) and contribute one written knowledge artefact (case study or internal wiki entry) per quarter	Peer Learning	April — October 2027	Three Community of Practice sessions attended; two written contributions published to the Northbridge Knowledge Hub (SD-01).	Medium
ACT-6	OBJ-4	Establish a monthly cross-practice check-in with a consultant from Data Engineering or Strategy & Analytics, facilitated by the L&D Manager	Mentoring	May — October 2027	Four cross-practice check-ins completed; employee can name at least two active cross-practice contacts outside Applied AI by October 2027.	Low

## Sequencing Notes

- **ACT-1 and ACT-2 start in parallel in April** because executive communication is the highest-priority gap and the employee's delivery load eases after March. The coaching sessions (ACT-1) build presentation structure skills while the self-paced course (ACT-2) reinforces data storytelling — both feed into the steering presentation rotation (ACT-4) starting in June.
- **ACT-3 begins in May** once the employee has one month of coaching under way. Proposal writing is the second high-priority gap, and the Proposal Co-Author Programme (SA-01) depends on active pipeline — May start allows the Practice Head to identify suitable proposals in advance.
- **ACT-5 and ACT-6 run as ongoing lightweight activities** from April/May onward. These medium- and low-priority actions do not require dedicated time blocks and can be maintained during delivery periods, addressing the employee's concern about protecting time for non-delivery activities.

---

## Resource and Budget Notes

---

- **CM-01 (Senior Leader Coaching):** Current wait list is approximately 6 weeks. The L&D Manager should submit the matching request by mid-February to secure an April start.
  - **FT-03 (Advanced Data Storytelling):** Always available via existing annual licence. No additional budget required.
  - **SA-01 (Proposal Co-Author Programme):** New for 2027; process still being formalised. The Practice Head will coordinate pipeline alignment. No direct cost — time investment only.
  - **SA-03 (Client Steering Presentation Rotation):** Informal programme arranged by the Practice Head. Depends on active engagement availability in June–August window.
  - **FT-04 (Professional Services Selling Skills):** Listed in the catalogue but discontinued after Q2 2026 restructure — excluded from this plan.
  - **CM-03 (External Executive Coach):** Excluded — requires Principal Consultant eligibility or HR Director exception approval, and exceeds standard development allocation. May be reconsidered if coaching via CM-01 proves insufficient after the first three sessions.
  - **Budget confirmation needed:** The L&D Manager has flagged that the previous year's development allocation may have lapsed. The HRIS Administrator should confirm remaining budget before any paid external programmes are committed.
- 

## Deprioritised Items

---

Gap	Reason for Deprioritisation
GAP-4 (Cross-Practice Relationship Building)	Rated Low priority in the Capability Gap Summary. Addressed through lightweight ACT-6 (monthly check-in) rather than a formal programme. If cross-practice engagement does not improve by the October review, escalate to a structured short-term secondment (SA-02) in Q1 2028.

---

## Sign-Off Section

---

- **Manager Approval:** [Pending — Practice Head, Data & AI Advisory]
  - **Employee Acknowledgement:** [Pending]
  - **L&D Manager Review:** [Pending — confirm budget status and CM-01 matching timeline]
  - **Review Date:** 15 July 2027 (mid-plan progress check)
- 

AGASI AiOS — Sample material. For illustrative purposes. All data is fictional.