

# Performance Review Pack

**Employee Role:** Senior Data & AI Consultant **Department:** Data & AI Advisory — Applied AI Sub-Team **Organisation:** Northbridge Advisory Partners **Review Period:** 14 July 2026 — 14 January 2027 **Prepared By:** Practice Head, Data & AI Advisory (with GenAI drafting assistance) **Review Date:** 15 January 2027

## Executive Summary

The Senior Data & AI Consultant completed the first six-month review period with solid technical delivery and professional development, balanced against shortfalls in business development contribution and executive communication. Of five structured goals, two were rated Meets, two Partially Meets, and one Below. The primary strength demonstrated is consistent, high-quality technical output — the GenAI knowledge assistant pilot received a 4.3/5.0 client satisfaction rating and zero critical defects were recorded. The primary development focus is building commercial and stakeholder skills: proposal writing to Northbridge standards and tighter executive-level presentation delivery.

## Goal Attainment Overview

Goal ID	Goal Area	Attainment Rating	Evidence Summary	Key Strength	Key Gap
G1	Technical Delivery	Meets	Architecture options paper approved with minor comments; vector database evaluation informed client technology selection; implementation report received 4.5 from Client Technical Lead. One omission (fallback strategy) caught by client and remediated within 48 hours.	Consistent on-time, high-quality technical deliverables across engagements.	Self-review rigour — missed the fallback strategy gap before client submission.
G2	Stakeholder Engagement	Partially Meets	Client satisfaction 4.3/5.0 on GenAI pilot; strong working relationships with Client Technical Lead and Business Sponsor. Steering presentation ran 8 minutes over; data residency question deferred. Cross-practice networking not pursued systematically.	Built effective client rapport quickly in the first engagement.	Executive-level presentation discipline and cross-practice visibility.
G3	Business Development	Below	One proposal contribution (retail data strategy) requiring two revision rounds. No second contribution. Follow-on opportunity flagged but not formally pursued.	Willingness to contribute and identify follow-on opportunities.	Volume and quality of proposal contributions below the half-year target.
G4	Knowledge Sharing & Team Contribution	Partially Meets	One brown-bag session (4.2/5.0 rating, 14 attendees). No formal Q4 session. Three informal mentoring sessions (not formalised). Retrospective improvement suggestions accepted.	Proactive knowledge sharing and constructive retrospective contributions.	Knowledge-sharing cadence dropped in Q4; mentoring not formalised.
G5	Professional Development	Meets	Azure AI Engineer Associate (AZ-102) achieved December 2026 (second attempt). Learning budget used appropriately. Development plan discussion with L&D Manager rescheduled, not yet completed.	Persistence in achieving certification; honest self-assessment of gap areas.	L&D Manager development plan discussion still outstanding.

## Review Narratives

### G1 — Technical Delivery

**Rating:** Meets

Technical delivery goals were met consistently across the review period. The architecture options paper for the GenAI knowledge assistant pilot was delivered three days ahead of the internal deadline and approved with formatting comments only (Evidence Log, Entry 3). The vector database evaluation produced a comparative analysis that directly informed the client's technology selection (Entry 4), and the final implementation report received a 4.5 client satisfaction rating from the Client Technical Lead. One gap was identified: the implementation report initially omitted the fallback strategy for embedding model deprecation, which the client flagged (Entry 8). The missing section was addressed within 48 hours, but catching this in self-review before submission would reduce the risk of client-visible omissions.

**Manager Discussion Prompt:** What self-review steps could you build into your deliverable process to catch gaps like the fallback strategy before client submission?

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## G2 — Stakeholder Engagement

**Rating:** Partially Meets

Client relationship-building on the GenAI pilot was effective — the client satisfaction survey returned an average of 4.3/5.0, with the Client Technical Lead and Business Sponsor both rating 4.5 (Evidence Log, Entry 12). However, the steering committee presentation in October ran 8 minutes over the allocated time and a data residency question was deferred to the engagement lead (Entry 5). The VP of Technology's survey comment reinforced this: "Steering presentations could be tighter — we need more time for questions." The consultant's self-assessment acknowledges this gap and references a new practice of preparing pre-read documents. Internally, cross-practice visibility remains limited — the self-assessment notes that relationships outside the Applied AI sub-team have not been systematically developed (Self-Assessment, Section 2).

**Manager Discussion Prompt:** How are the pre-read documents working in practice, and what other changes to your steering preparation would help you stay within time?

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## G3 — Business Development

**Rating:** Below

The target of two proposal or scoping contributions per half-year was not met. One contribution was made — the technical methodology section for a retail data strategy proposal — but it required two rounds of revision to meet Northbridge proposal standards, specifically around timeline restructuring and risk mitigation language (Evidence Log, Entry 7). No second proposal contribution occurred during the review period. The self-assessment cites GenAI pilot workload as the primary constraint (Self-Assessment, Section 3). A potential follow-on engagement with the GenAI pilot client was flagged to the Practice Head but no formal follow-up has occurred. The shortfall is partly attributable to the onboarding period, but proactive pipeline engagement was limited.

**Manager Discussion Prompt:** What would make it easier for you to identify and contribute to proposal opportunities alongside delivery commitments?

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## G4 — Knowledge Sharing & Team Contribution

**Rating:** Partially Meets

One formal knowledge-sharing session was delivered — the August brown-bag on LLM deployment patterns, which received a 4.2/5.0 average rating from four attendees (Evidence Log, Entry 2). This meets the quarterly target for Q3 but no formal session was delivered in Q4. The planned follow-up session was deprioritised during the GenAI pilot implementation phase (Self-Assessment, Section 4). Informal mentoring of a junior analyst covered code review and client communication over three sessions (Entry 6), though no formal mentoring agreement has been filed. Retrospective contributions were constructive — the engagement onboarding checklist suggestion was accepted and assigned for implementation (Entry 10).

**Manager Discussion Prompt:** How could you maintain a quarterly knowledge-sharing cadence even during peak delivery periods — would shorter formats or written assets help?

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## G5 — Professional Development

**Rating:** Meets

The Azure AI Engineer Associate certification (AZ-102) was achieved in December 2026 on the second attempt (Evidence Log, Entry 9). The first attempt in November was unsuccessful, with the consultant identifying responsible AI and governance sections as the gap areas (Self-Assessment, Section 5). The pro-rated learning budget was used appropriately for certification preparation. The long-term

development plan discussion with the L&D Manager, originally scheduled for Day 90, was rescheduled to January due to scheduling conflicts and has not yet occurred. The self-assessment expresses interest in a team leadership progression path, which should be discussed during the development planning session.

**Manager Discussion Prompt:** Now that the certification is complete, what's the next priority for your technical and leadership development — and how can we ensure the L&D Manager discussion happens promptly?

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## Capability Gap Summary

**Summary:** Four capability gaps were identified across the review period, drawn from goals rated Partially Meets or Below. The overall development priority level is **Moderate** — none of the gaps represent a critical performance risk, but targeted action is needed in business development and stakeholder communication before the next review cycle.

Gap ID	Related Goal(s)	Capability Area	Evidence of Gap	Development Action Type	Priority
GAP-1	G2	Executive Communication	Steering committee presentation ran 8 minutes over time; data residency question deferred to engagement lead (Evidence Log, Entry 5). VP of Technology feedback: "Steering presentations could be tighter."	Coaching	High
GAP-2	G3	Proposal & Commercial Writing	Sole proposal contribution required two revision rounds to meet Northbridge standards — timeline restructuring and risk mitigation language were the primary issues (Evidence Log, Entry 7). No second proposal contribution in the review period.	Stretch Assignment	High
GAP-3	G4	Sustained Knowledge Sharing	One formal session delivered in Q3; none in Q4. Follow-up session deprioritised during delivery peak (Self-Assessment, Section 4). Informal mentoring not formalised.	Self-Directed Learning	Medium
GAP-4	G2	Cross-Practice Relationship Building	Relationships limited to Applied AI sub-team. Self-assessment notes systematic cross-practice networking has not been pursued (Self-Assessment, Section 2).	Mentoring	Low

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## Next Steps

- **Schedule development plan discussion with L&D Manager** by end of January 2027 to align on GAP-1 coaching arrangement and GAP-2 stretch assignment. This meeting was originally due at Day 90 and should not be delayed further.
- **Assign the consultant as a named proposal contributor** on two Q1 2027 opportunities, with first-draft review from a senior consultant experienced in Northbridge proposal standards, to directly address the business development shortfall.
- **Confirm formal mentoring agreement** for the junior analyst mentoring relationship and schedule the deferred Q4 knowledge-sharing session for early Q1 2027 to re-establish cadence.

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