

# Role Expectations Document

**Role Title:** Senior Data & AI Consultant **Grade:** SC-3 **Department:** Data & AI Advisory **Practice:** Applied AI Sub-Team **Organisation:** Northbridge Advisory Partners **Effective Date:** Current role expectations version **Document Owner:** Practice Head, Data & AI Advisory **Last Updated:** Current goal-setting cycle

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## 1. Role Purpose

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Deliver data and AI consulting engagements for Northbridge Advisory Partners clients, from scoping through implementation handover. The Senior Consultant operates with autonomy on defined workstreams and contributes to practice development through knowledge sharing and proposal support.

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## 2. Core Responsibilities

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### 2.1 Client Delivery

- Lead individual workstreams within client engagements, owning deliverables from design to sign-off.
- Apply Northbridge engineering standards (v1, current published) and the delivery playbook to all engagement work.
- Produce technical documentation, solution designs, and implementation plans that meet client and internal quality standards.
- Escalate delivery risks to the engagement lead within 24 hours of identification.

### 2.2 Stakeholder Engagement

- Build trusted advisory relationships with client technical leads and business sponsors.
- Translate complex AI/data concepts into business-relevant language for non-technical stakeholders.
- Represent Northbridge Advisory Partners at client workshops, steering committees, and review sessions.

### 2.3 Business Development

- Contribute to at least two proposals or scoping exercises per half-year.
- Support the Practice Head in identifying follow-on work within existing engagements.
- Maintain awareness of the practice pipeline and participate in resource planning discussions.

### 2.4 Knowledge Management & Team Contribution

- Deliver at least one internal knowledge-sharing session (brown-bag, tech talk, case study write-up) per quarter.
- Mentor junior consultants on technical approaches and client interaction skills.
- Contribute to internal tooling, accelerators, or reusable assets for the Applied AI sub-team.

### 2.5 Professional Development

- Maintain current relevant certifications (e.g., Azure AI Engineer, AWS ML Specialty, or equivalent).
  - Complete the annual learning plan agreed with the L&D Manager within the allocated budget.
  - Participate in practice retrospectives and contribute improvement suggestions.
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## 3. Performance Expectations

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### 3.1 Billable Utilisation

Target: 70% billable utilisation across the review period. Non-billable time allocated to business development (10%), knowledge management (10%), and professional development (10%).

**Note:** The utilisation model was updated in the prior plan year. The previous L4-grade target of 75% no longer applies to SC-3 roles. Refer to the current utilisation policy for SC-3 bands.

### 3.2 Client Satisfaction

Target: Achieve a client satisfaction rating of 4.0 or above (on a 5-point scale) on all engagement feedback surveys completed during the review period.

### 3.3 Technical Quality

Target: Zero critical defects attributable to the consultant's deliverables during the review period. Minor defects should not exceed two per engagement phase.

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### 3.4 Timely Delivery

Target: All workstream deliverables submitted within the agreed timeline. Delays must be flagged to the engagement lead at least 5 business days before the deadline.

## 4. Competency Framework Reference

This role is assessed against the Northbridge Competency Framework v2.1 (original publication cycle) at the "Practitioner" level for all competency domains.

**Note:** The competency framework is currently under review. Version 3.0 is expected in an upcoming release window. Until then, v2.1 remains the reference. Some competency descriptions may not fully align with the Applied AI sub-team's scope — the Practice Head will clarify any ambiguities during goal-setting.

### Competency Domains

Domain	Level Required	Description
Technical Excellence	Practitioner	Applies deep technical skills independently; designs solutions with minimal oversight
Client Partnership	Practitioner	Manages client relationships at working level; presents recommendations confidently
Commercial Awareness	Foundation	Understands engagement economics; contributes to proposal content
Leadership & Influence	Foundation	Mentors junior team members; influences technical decisions within the team
Innovation & Learning	Practitioner	Proactively identifies improvement opportunities; stays current with relevant technology

## 5. Reporting & Review Cycle

- **Reports to:** Practice Head, Data & AI Advisory
- **Review Cadence:** Formal review at 6 months (probation) and 12 months (annual), with quarterly check-ins.
- **Probation Period:** 6 months from start date. Probation review based on milestone completion per the 30-60-90 onboarding plan and initial performance against the expectations in this document.

**Note:** The HR policy handbook (v4.2, prior revision) still references a 3-month probation for SC-3+ roles. The HR Director has verbally confirmed the 6-month standard applies to all grades. Pending policy document update.

## 6. Key Metrics Summary

Metric	Target
Billable utilisation	70%
Client satisfaction (engagement surveys)	> = 4.0 / 5.0
Critical defects	0 per review period
Proposals / scoping contributions	> = 2 per half-year
Knowledge-sharing sessions	> = 1 per quarter

## Approvals

Role	Status	Date
Practice Head, Data & AI Advisory	Approved	Current sign-off (Practice Head)
HR Director, People & Culture	Pending	—

HR Director sign-off has been requested but not yet received. The Practice Head has confirmed this document can be used for onboarding goal-setting in the interim.