

Self-Assessment Notes

Role: Senior Data & AI Consultant **Department:** Data & AI Advisory — Applied AI Sub-Team **Organisation:** Northbridge Advisory Partners **Review Period:** Current performance review cycle **Submitted:** Current review-cycle submission window **Submitted To:** Practice Head, Data & AI Advisory

Instructions

Please reflect on your performance over the review period against your role expectations and onboarding milestones. Cover what went well, what was challenging, and where you see development opportunities. Be specific — reference projects, deliverables, and outcomes where possible.

1. Technical Delivery

I feel the GenAI knowledge assistant pilot was the highlight of my first six months. Leading the data architecture workstream gave me the chance to apply my previous experience in a new context. The vector database evaluation was well received by the client and I'm proud that the architecture options paper was approved with only formatting changes. The implementation report also got positive client feedback, even though I missed the fallback strategy section initially — I should have caught that in my own review before submitting.

The predictive maintenance engagement was useful for onboarding but I didn't have a chance to contribute materially since I was in a shadowing role. I would have preferred to take on a small deliverable earlier, but I understand the ramp-up approach.

Overall, I think my technical delivery has been strong. I delivered everything on time or ahead of schedule and there were no quality issues with my work.

2. Stakeholder Engagement

Client relationships on the GenAI pilot went well. The Client Technical Lead and Business Sponsor were easy to work with and I built a good working rapport. The mid-cycle steering committee presentation didn't go as smoothly — I ran over time and wasn't fully prepared for the data residency question. I've since started preparing pre-read documents for any presentation to senior stakeholders, which has helped.

Internally, I've connected well with the Applied AI sub-team but haven't built as many relationships across the wider practice (42 consultants). I attended the early-cycle practice meeting and introduced myself but haven't followed up systematically. I think I should be more proactive about cross-practice networking.

3. Business Development

I contributed to one proposal — the retail data strategy engagement. I wrote the technical methodology section and felt it was a solid contribution, though I know it needed revisions to match the Northbridge proposal format. I haven't contributed to a second proposal yet, which is below the target. The GenAI pilot consumed most of my billable time in the latter part of the review period and I didn't actively seek proposal opportunities.

I did identify a potential follow-on engagement with the GenAI pilot client — they mentioned interest in extending the knowledge assistant to a second business unit. I flagged this to the Practice Head in our year-end check-in but haven't been involved in any formal follow-up.

4. Knowledge Sharing & Team Contribution

The brown-bag session on LLM deployment patterns was a good start. I received positive feedback and there's been interest in a follow-up. I haven't delivered the follow-up session yet — it was deprioritised when the GenAI pilot moved into the implementation phase.

The mentoring relationship with the junior analyst has been rewarding. We've met several times and focused on code review practices and client communication. I'd like to formalise this with a proper mentoring agreement in the next review period.

The retrospective contributions felt impactful — especially the engagement onboarding checklist idea, which was accepted. The prompt library suggestion is still under review.

5. Professional Development

I completed the Azure AI Engineer Associate certification, though it took two attempts. The first attempt showed me I needed to focus more on the responsible AI and governance sections, which are less familiar from my previous roles. The second attempt went well.

I used the pro-rated learning budget (approx. GBP 1,000) for the certification prep. I haven't yet discussed a long-term development plan with the L&D Manager — that meeting was scheduled for Day 90 but was pushed after Day 90 because of scheduling conflicts.

I'm interested in pursuing a team leadership track and would like to discuss what the path to Senior Manager or Engagement Lead looks like at Northbridge.

6. Areas Where I Need Support

- **Proposal writing:** I need more exposure to the Northbridge proposal format and standards. The two rounds of revision on the retail proposal suggest I'm not yet aligned with expectations.
 - **Time management across engagements:** My early-cycle utilisation was low partly because of the onboarding ramp-up, but also because I wasn't proactive about filling the gap between engagements.
 - **Steering committee presentations:** I want to improve at executive-level communication — shorter, punchier, with built-in time for questions.
 - **Wider practice visibility:** I should invest more time in cross-practice relationships and visibility, not just within the Applied AI sub-team.
-

7. Overall Self-Rating

I would rate my overall performance as **Meets Expectations** for the first six months. Technical delivery has been strong and I've started contributing beyond my immediate workstream. The areas where I fell short — utilisation, proposal contributions, and knowledge-sharing frequency — are partly explained by the onboarding period but I take responsibility for not being more proactive in filling gaps.