

HR12 · STEP 4 · FINAL

Learning & Development Planning

Targeted Learning Plan

Sequenced development actions linked to capability gaps, time frames, success indicators, preference fit, and manager sign-off.

ABOUT THIS DOCUMENT

This is a **sample** deliverable from the **Learning & Development Planning** workflow (HR12) in AGASI AiOS. It shows the expected structure and tone. All names, numbers, and facts are **fictional**.

Targeted Learning Plan

Employee Role: Senior Data & AI Consultant **Department:** Data & AI Advisory — Applied AI Sub-Team **Organisation:** Northbridge Advisory Partners **Plan Period:** Upcoming development plan window **Prepared By:** L&D Manager, People Development (with GenAI drafting assistance) **Reviewed By:** Practice Head, Data & AI Advisory **Date:** Current development planning cycle

Development Summary

Six development actions are planned across a six-month horizon starting after the current busy season. 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	First 3 months of plan	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	First 2 months of plan	Course completed by end of second month; 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	Months 2–4 of plan	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	Months 3–5 of plan	Two steering presentations delivered; observer feedback confirms structured delivery and confident Q&A handling.	High

Action ID	Objective ID	Development Action	Action Type	Time Frame	Success Indicator	Priority
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	Full plan window	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	Months 2–6 of plan	Four cross-practice check-ins completed; employee can name at least two active cross-practice contacts outside Applied AI by plan close.	Low

Sequencing Notes

- **ACT-1 and ACT-2 start in parallel at plan start** because executive communication is the highest-priority gap and the employee's delivery load eases after the prior busy season. 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 month three.
- **ACT-3 begins in month two** 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 — a staggered start allows the Practice Head to identify suitable proposals in advance.
- **ACT-5 and ACT-6 run as ongoing lightweight activities** from early in the plan 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 at least 6 weeks before the desired start.
- **FT-03 (Advanced Data Storytelling):** Always available via existing annual licence. No additional budget required.
- **SA-01 (Proposal Co-Author Programme):** New programme; 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 the mid-plan window.
- **FT-04 (Professional Services Selling Skills):** Listed in the catalogue but discontinued after recent 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 plan mid-point review, escalate to a structured short-term secondment (SA-02) in a subsequent plan year.

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:** Mid-plan progress check (L&D to set with Practice Head)