

Northline Advisory

Oct 16, 2026

Your policy and rollout snapshot

AI Policy & Rollout Kit - Consulting edition • Prepared by Practice operations lead

0.3 Policy version

Draft Recorded policy status

2 Rollout records

3 Open actions

Approval and release

Owner: Practice operations lead • Approver: Engagement partner

Approved: Not recorded • Effective: Not recorded • Next review: 2026-10-22

Approval evidence: Not recorded

4 staff-release checks still need attention. Topics drafted: 11 of 11. Acknowledged: 0. Approval and rollout are tracked separately.

Purpose and scope

Policy scope: Draft for Northline Advisory: applies to 24 consultants and 4 associates across research, delivery and operations. Examples cover internal research and advisory delivery. They do not establish permission to use client material or replace engagement and professional review.

Next steps and open work

- A-1 • Two figures in the draft still lack a verified primary source. Engagement... • Engagement partner • Due Oct 22, 2026 • In progress
- A-2 • Interview-processing permission is absent from the engagement instructions.... • Engagement partner • Due Oct 22, 2026 • Blocked
- A-3 • Two associates have not confirmed their personal-tool use. Practice lead checks... • Engagement partner • Due Oct 22, 2026 • In progress

Section notes

- Actions: Engagement partner: resolve interview-processing permission is absent from the engagement instructions before extending the workflow. Review by...
- Policy decisions: Practice operations lead: confirm the scope and supporting evidence for the recorded uses. Keep permission gaps visible and save the reviewed work...

This report summarizes your records. The Full record export preserves complete notes, entries and review coverage.

Before this leaves your team

Confirm the scope and supporting evidence with the owners. Resolve or clearly disclose open conditions. Choose the full record when the recipient needs detailed answers or evidence locations.

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Policy and rollout status

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Version 0.3 • Draft • Owner Practice operations lead

4 staff-release checks need attention. Exporting a draft never approves the policy.

0 participant records; 0 acknowledged; 0 understanding checks recorded as passed. Counts describe the participant register only; check it against the full intended audience.

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Rollout activity and evidence

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Approval, distribution, acknowledgment and understanding are separate events. Showing 1-2 of 2 records. Long cells are excerpts; full wording is in the internal working record.

Activity / audience	Planned	Recorded completion
Briefing / 24 consultants and 4 associates across research, delivery and operations	2026-10-22	Not recorded
Understanding check / Staff and contractors after policy approval	2026-10-22	Not recorded

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AI uses and recorded boundaries

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Each record is one reported AI use. File imports and source approval claims do not grant approval. Review permissions and conditions in the full record. Showing 1-3 of 3 records. Long cells are excerpts; full wording is in the internal working record.

Tool / use	Purpose / information	Owner / status
U-1 • ResearchDesk	Summarize published market research for an internal briefing • Public reports with source references	Engagement partner / Restricted
U-2 • MeetingNote	Summarize client stakeholder interviews • None pending permission review	Engagement partner / Unapproved
U-3 • ProposalDesk	Draft a proposal from reusable firm materials • Firm-owned capability statements and synthetic examples	Engagement partner / Restricted

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Action handover

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3 open actions. Open actions first, then earliest recorded due date. Completed entries remain visible. Showing 1-3 of 3 records. Long cells are excerpts; full wording is in the internal working record.

Next action	Owner	Due / status
Two figures in the draft still lack a verified primary source. Engagement partner opens cited sources and checks claims before client delivery	Engagement partner	2026-10-22 / In progress
Interview-processing permission is absent from the engagement instructions. Engagement partner checks written client permission and approved retention settings	Engagement partner	2026-10-22 / Blocked
Two associates have not confirmed their personal-tool use. Practice lead checks that no previous client material or identifiable case detail is reused	Engagement partner	2026-10-22 / In progress