endsight

CASE STUDY | TALENT & PERFORMANCE

# The Development Plan Builder

How Endsight turned its official readiness plans into a self-service AI tool that helps employees and managers have better development conversations, without taking people out of the decision.

## At a glance

Endsight publishes official readiness plans that describe what success looks like at each level of a role, and keeps a live hub of job descriptions. In August 2026, our Talent & Performance team began building the Development Plan Builder: an AI skill, built on Claude, that turns those sources into a personalized development plan through a guided conversation. Today it is in a live pilot with real employees and managers.

**12**
official role paths built into the tool, across six role families

**4**
outputs from one conversation: gap check, 1:1 prep, full plan, and goals

**20**
roles on a live job description hub the tool reads from

The tool drafts. People decide. Every plan it produces is a starting point for a conversation between an employee and their manager, and plans are finalized together.

## The challenge: great plans, hard to put to work

A readiness plan is only useful if it becomes a real conversation. Turning a role-level document into an individual plan means finding the right plan, comparing it to the job description, gathering examples of the employee's work, and writing it all up in a consistent format. That takes time from managers who are already stretched, and the quality of the result can vary from one manager to the next.

We wanted every employee to get the same quality of development conversation, whether their manager had done this fifty times or never before.

## What we built

The Development Plan Builder is a self-service skill employees and managers open in Claude by name. It draws on two sources of truth: the official readiness plans, embedded in the skill and updated annually, and the live job descriptions on our internal hub. It offers four outputs:

1. **Readiness gap check.** Walks through what success looks like at the next level and where the employee is strong or has room to grow.

2. **1:1 conversation prep.** Strengths-first observations, open questions for each development priority, and the support commitments in the plan.
3. **A completed development plan.** A finished Word document in Endsight's official plan format, ready for both signatures.
4. **Draft performance goals.** SMART goals tied to the plan's priorities, ready to finalize with a manager in our HR system.

Every official plan follows the same four-part structure for each priority: the current pattern, the behavior expected at the next level, development actions, and success indicators. Consistency is built in.

## Built with guardrails, not just features

Development planning affects people's careers, so we designed the tool around the same principle we use for AI everywhere: it supports human judgment and never replaces it.

- **A conversation starter, not a verdict.** Everything the tool drafts is labeled as a draft for an alignment conversation. Managers and employees co-create the final actions.
- **No promises on pay or promotion.** The tool will not discuss compensation, promise promotions, or set timelines. Those conversations stay with people.
- **Evidence over impressions.** It asks for specific examples like tickets, projects, customer feedback, or certifications, so observations stay factual.
- **Honest about gaps.** Where a role does not yet have a defined metric or certification path, plans say "not yet defined" instead of inventing one.
- **Aware of its limits.** The tool does not see an employee's performance data. That context comes from the manager in the 1:1, before any plan is finalized.

## Coverage today

We launched with depth where our plans are strongest and a lighter mode everywhere a job description exists, rather than waiting for every role to be perfect.

| Level of support | What it means | Roles |
|---|---|---|
| **Full experience** | Official readiness plan plus live job description | 12 role paths across Response Center Engineer, Account Specialist, Field Engineering, Professional Services, NOC Systems Administration, and Platform Operations |
| **Job description mode** | Plan built from the live job description | About 15 roles, including Client Strategy, Sales, Procurement, Project Management, and Platform Architecture |
| **Coming next** | Job descriptions and plans in progress | Remaining internal teams, plus an org-wide audit for any roles not yet on the hub |

## How we are rolling it out

- **Pilot first.** Real managers and employees are using the tool today in a live pilot, and their feedback is shaping it before company-wide release.
- **Managers before everyone.** Manager-focused guidance goes out first, so leaders are ready when their teams start using it.
- **Versioned and maintained.** New plans and roles are added through versioned releases, with plans refreshed annually.
- **Next: a baseline skills assessment and real performance data.** A built-in assessment will help shape each plan around where the employee is today. We are also exploring ways to bring performance reviews, real metrics, and KPIs into the skill, so plans reflect actual results and not just role expectations.

## What this means for your business

You do not need a large HR team to give every employee a quality development conversation. The lessons apply to any organization adopting AI for people processes:

- **Start with your own sources of truth.** AI is most useful when it works from documents you already trust, like job descriptions and role expectations.
- **Draft with AI, decide with people.** Keep career, pay, and promotion decisions in human hands, and label AI output as a draft.
- **Be honest about what is missing.** A tool that says "not yet defined" builds more trust than one that fills gaps with guesses.
- **Launch where you are ready, then expand.** Full support for some roles and a lighter mode for others beats waiting for perfect.

Endsight helps small and mid-sized businesses adopt technology, including AI, with the right guardrails in place. To explore how AI could support your team's people processes, reach out to your Endsight Client Strategy Manager.