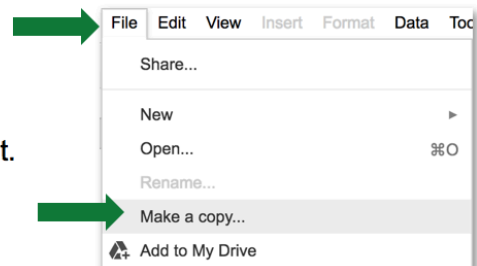


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# Career Development Action Plan Template Example

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## Template Begins on Page 2.

### Career Development Action Plan Template Example

|                      |                   |
|----------------------|-------------------|
| Employee             | Brian Gorman      |
| Job Title            | Financial Analyst |
| Department           | Corporate Finance |
| Manager / Supervisor | Brooklyn Jansen   |
| Plan Date            | MM/DD/YY          |

#### Career Goals (SMART)

| SMART      | Goal   | Timeframe        |
|------------|--|------------------|
| Specific   | Develop expertise in financial forecasting and data visualization          | One year         |
| Measurable | Complete two advanced Excel modeling courses, lead one forecasting project | By Q2 20XX       |
| Achievable | Utilize company-provided training and mentorship support                   | Ongoing          |
| Relevant   | Enhance financial reporting accuracy, align with career progression        | Immediate impact |
| Time-Bound | Present a forecasting model to senior leadership                           | By Q4 20XX       |

#### Strengths and Work Style Analysis

| Category                       | Description   |
|--------------------------------|---|
| Key Strengths in the Workplace | Analytical mindset, problem-solving skills, attention to detail |
| Preferred Work Style           | Independent with structured collaboration                       |
| Best Learning Methods          | Hands-on projects, interactive training, mentorship             |
| Ideal Work Environment         | Pace-paced, data-driven, cross-functional collaboration         |
| Challenges and Growth Areas    | Public speaking confidence, stakeholder communication           |

#### Skills and Competency Development

| Skill Category                | Current Level | Target Level (by Year 5) |
|-------------------------------|---------------|--------------------------|
| Financial Modeling            | Intermediate  | Advanced                 |
| Data Analysis                 | Strong        | Expert                   |
| Leadership and Communications | Developing    | Proficient               |
| Risk Assessment               | Basic         | Advanced                 |

#### Training, Education, and Certification Costs

| Category                    | Description                                | Estimated Cost |
|-----------------------------|--|----------------|
| Company-Sponsored Training  | Advanced Excel and Data Analytics Course   | \$500.00       |
| Certification and Licensing | CFA Level 1 Certification                  | \$1,200.00     |
| External Education Programs | Financial Analyst Bootcamp                 | \$800.00       |
| Conferences and Seminars    | Annual Finance Leadership Summit           | \$900.00       |
| Technology and Tools Needed | Tableau License, Bloomberg Terminal Access | \$1,500.00     |

#### Action Plan

| Improvement Activity                       | Target Date | Owner    | Status      |
|--|-------------|----------|-------------|
| Advanced Excel and Data Analytics Training | MM/DD/YY    | Employee | In Progress |
| Lead in Financial Forecasting Project      | MM/DD/YY    | Employee | Not Started |
| Cross-Training in Corporate Strategy       | MM/DD/YY    | Employee | Not Started |
| Industry Conference Participation          | MM/DD/YY    | Employee | Scheduled   |
| Promotional Readiness Assessment           | MM/DD/YY    | Manager  | Pending     |
| Next Review                                | MM/DD/YY    | Manager  | Pending     |

|                                  | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|----------------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Advanced Training                |     |     |     |     |     | X   |     |     |     |     |     |     |
| Leadership Project               |     |     |     |     |     |     |     |     |     |     |     |     |
| Cross-Training                   |     |     |     |     |     |     |     |     |     |     |     |     |
| Networking and Development       |     |     |     |     |     |     |     | X   |     |     |     |     |
| Promotional Readiness Assessment |     |     |     |     |     |     |     |     |     | X   |     |     |

#### Success Metrics and Evaluation

| Metric                            | Description  | Measurement                    |
|-----------------------------------|--|--------------------------------|
| Key Performance Indicators (KPIs) | Improvement in forecasting accuracy, dashboard efficiency      | Weekly and monthly reports     |
| Promotional Readiness Review      | Assessment of leadership and technical skills for advancement  | Call and email quality audits  |
| Performance Review Schedule       | Biannual review of progress toward goals and skill application | Manager evaluations            |
| Feedback Collection Methods       | 360-degree reviews, self-assessment, peer feedback             | Survey data and review reports |

#### Career Advancement

| Category              | Description              | Action Steps                                 | Target Date |
|-----------------------|--------------------------|--|-------------|
| Target Future Role(s) | Senior Financial Analyst | Develop leadership and forecasting expertise | MM/DD/YY    |

|                      |                   |
|----------------------|-------------------|
| Employee             | Brian Gorman      |
| Job Title            | Financial Analyst |
| Department           | Corporate Finance |
| Manager / Supervisor | Brooklyn Jansen   |
| Plan Date            | MM/DD/YY          |

## Career Goals (SMART)

| SMART      | Goal   | Timeframe        |
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| Measurable | Complete two advanced Excel modeling courses, lead one forecasting project | By Q2 20XX       |
| Achievable | Utilize company-provided training and mentorship support                   | Ongoing          |
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# Strengths and Work Style Analysis

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# Skills and Competency Development

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# Action Plan

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| Feedback Collection Methods       | 360-degree reviews, self-assessment, peer feedback             | Survey data and review reports |

# Career Advancement

| Category                                | Description  | Action Steps                                 | Target Date |
|---|--|--|-------------|
| Target Future Role(s)                   | Senior Financial Analyst   | Develop leadership and forecasting expertise | MM/DD/YY    |
| Required Skills & Competencies          | Budget planning, financial risk assessment, stakeholder management | Complete targeted training, lead projects    | MM/DD/YY    |
| Leadership and Growth Opportunities     | Supervise interns, present financial insights to executives        | Volunteer for leadership assignments         | MM/DD/YY    |
| Networking and Professional Development | Engage with finance professionals, attend industry events          | Join professional finance associations       | MM/DD/YY    |

|                              |   |                                     |          |
|------------------------------|---|-------------------------------------|----------|
| Support and Resources Needed | Managerial mentorship,<br>project leadership<br>opportunities | Request additional responsibilities | MM/DD/YY |
|------------------------------|---|-------------------------------------|----------|

# Self-Assessment and Feedback

| Category                  | Employee Reflection                                      | Manager Feedback                                |
|---------------------------|--|---|
| Career Progress           | Stronger analytical skills, growing leadership presence  | Excels in data-driven decision-making           |
| Challenges and Roadblocks | Need more exposure to executive communication            | Should take on more stakeholder-facing projects |
| Professional Strengths    | Strong problem-solving and financial modeling ability    | High technical aptitude, quick learner          |
| Future Focus Areas        | Refining leadership, public speaking, strategic planning | Continue growing executive communication skills |

# Review and Acknowledgement

|             |                      |
|-------------|----------------------|
| Reviewed By | Employee             |
| Title       | Financial Analyst    |
| Name        | Brian Gorman         |
| Date        | MM/DD/YY             |
| Reviewed By | Manager / Supervisor |
| Title       | Project Manager      |
| Name        | Brooklyn Jansen      |

Date

MM/DD/YY

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