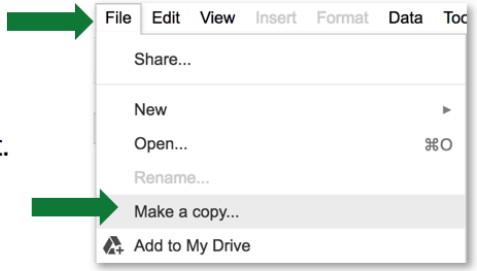


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Career Development Action Plan Template Example

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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	Fast-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 Analysis 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				
Promotion 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

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Department	Corporate Finance
Manager / Supervisor	Brooklyn Jansen
Plan Date	MM/DD/YY

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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, project leadership 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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