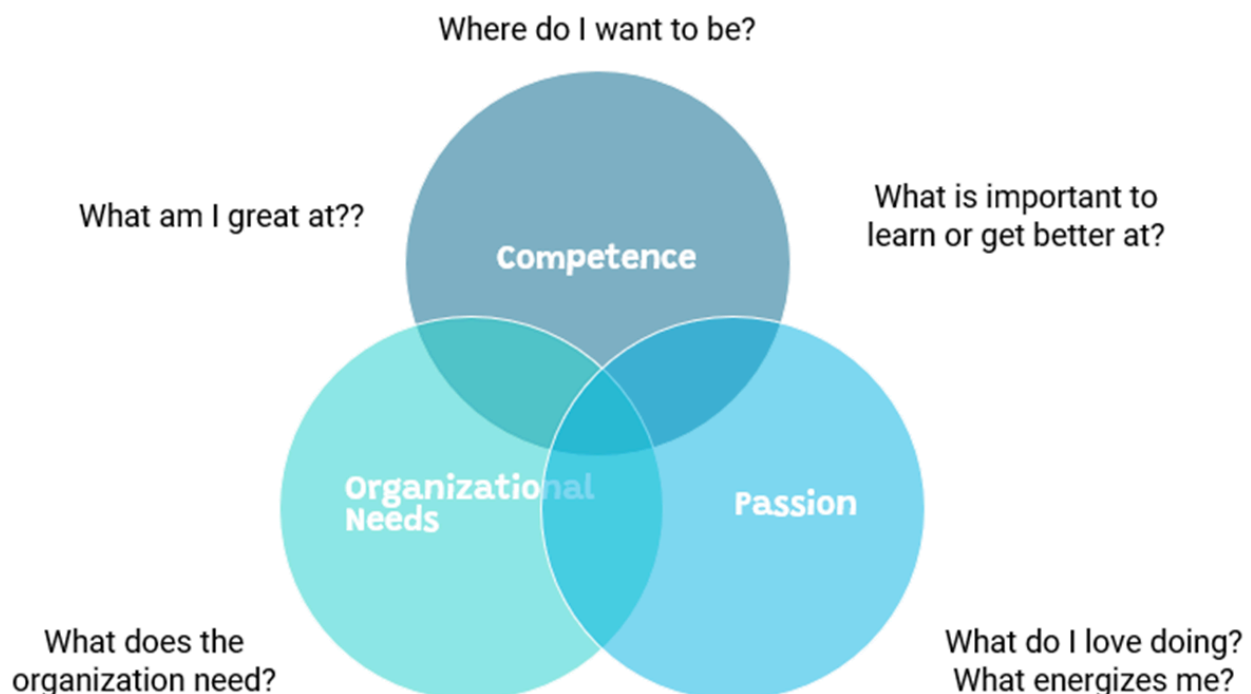


Individual Development Plan

Individual Development Plan (IDP) is a process you direct, in partnership with your manager, to enhance your professional growth by:

- Identifying and pursuing your personal goals for professional development.
- Setting goals to learn or improve in important competencies you will need now or in the future.
- Identifying your strengths, talents and passions and planning ways to use them on the job.

As a part of your IDP, you will identify the professional goals that matter to you, determine what experiences, skills and behaviors will help you achieve those goals and then create a plan of action to achieve your goals. You will work with your direct supervisor to evaluate areas that have the greatest potential to pay off for you, and for the company, in the short term and longer term.



Ingredients for Professional Development

1. **IDENTIFY** Your Professional Goals and Motivations

- What motivates and energizes you at work?
- What kinds of opportunities do you want in the future?
- What opportunities exist in your current role that will help you develop and grow?
- What do you want to learn and prepare for?

****Note your goals and motivations on the IDP Conversation Tool ****

2. **DETERMINE** Your Talents/Strengths and Development Opportunities

- What are your talents/strengths/passions?
- What are your areas to improve, or new areas to learn?
- Review your past performance evaluations, any performance-related feedback you have received from your supervisor?

****Note your goals and motivations on the IDP Conversation Tool ****

3. **PLAN** Your Focused IDP Objectives and Action Steps

- Considering your current career situation and future aspirations, where should you focus your development?
- Will your IDP include building capabilities, preparing for new opportunities or both?
- Which of your strengths/talents will you use more often or expand?
- What development opportunities are important for you to focus on?

****Note your goals and motivations on the IDP Conversation Tool ****

4. **MEET** With Your Manager

- Schedule a one-hour meeting with your manager to discuss your draft IDP.
- You will be responsible for running the meeting with your manager.
- Meet with your manager to discuss and refine your individual development plan.

5. **ACT** On Your Plan

- Complete an IDP form to finalize your plan and give a copy to your manager.
- Partner with your manager to make the plan work.
- Schedule quarterly follow up meetings to check on your progress.
- Act on the plan and assume ownership.

Think SMART

You may have set goals in the past that were difficult to achieve because they were too vague, aggressive, or poorly framed. Using the SMART goal framework can establish a strong foundation for achieving success. Utilize SMART when crafting your goals.

S	<ul style="list-style-type: none">• Specific goals are well defined on what needs to be accomplished• What outcomes do you need to see in order to consider a goal accomplished?
M	<ul style="list-style-type: none">• Measurable goals enable you to evaluate whether or not the goal was achieved or not.• How will you decide whether the goal is completed or not?
A	<ul style="list-style-type: none">• Attainable goals are realistic about what is possible given the availability of resources, knowledge, and time.• How likely is it that you can accomplish this goal?
R	<ul style="list-style-type: none">• Relevant goals are important to you and will make a material impact on achieving your larger objectives.• Does it make a difference to our overall objectives if this goal is met?
T	<ul style="list-style-type: none">• Time-Based goals lock goals into a specific timeframe and specify when they will be completed by.• When do you need the goal completed by?

IDP Conversation Tool

TEAM MEMBER	MANAGER
Where I see myself in the future	Where you see me in the future
Where I see my strengths and talents	Where you see my strengths and talents
Where I see my development opportunities	Where you see my development opportunities
What I see as development actions	What you see as my development actions
Development plan I commit to and you will support for this year	

Meet with your Manager

The plan begins to come alive during the IDP meeting. In this meeting the Team Member and manager discuss and refine the ideas they have prepared before the meeting, and talk about development within the current job, and possibilities for future career development.

The output from the discussion is a refined IDP with goals and activities spelled out that will allow the Team Member to grow in directions of interest, while contributing to the needs of the company. Together, the Team Member and manager create a plan the Team Member can act on and the manager can support.

TEAM MEMBER	MANAGER
Prepare for the meeting	
<ul style="list-style-type: none">• Think about what skills are needed for your current work and future positions, along with your interests and Squishable's needs.• Make notes in the Team Member sections of the IDP Conversation Tool and bring it to your meeting.• Prepare to lead the discussion – this is your development plan.	<ul style="list-style-type: none">• Review the Team Member's most recent performance evaluation and goals.• Think about resources and opportunities that might provide development for your Team Member.• Think about how your Team Member's talents and strengths can be best utilized.
Meet	
<ul style="list-style-type: none">• Your role is to provide an overview of your thoughts for each section of the IDP Conversation Tool and share how you arrived at your ideas.• Set a time to get the refined IDP back to your manager and schedule a time for your first check-in.	<ul style="list-style-type: none">• Make sure you're clear about what will be included in the refined IDP and how you will support it.• Schedule the first check-in when your Team Member will meet with you to check progress.

Conducting an IDP Meeting

1. State the purpose and process for IDP discussion. "I would like to talk about ideas for my development and get your feedback so that we can agree on some next steps."
2. Give your manager an overview of each of the sections of the IDP form and share how you arrived at your conclusions for each.
3. Invite your manager to share their perspective on each of the sections as you move through them and listen carefully to understand their perspective and reactions.
4. Decide with your manager which ideas to incorporate into your plan and agree when you will send them the finalized IDP form.
5. Thank your manager for their support and set a time when you will meet to check-in on progress.

Team Member	Manager
Follow-up on the plan	
<ul style="list-style-type: none">• Send your manager a copy of the finalized plan.• Implement the plan. This is your career, your future, and only you can take the steps required to develop and grow your skills and capabilities.• Hold to your scheduled meetings with your manager to track progress and make adjustments as necessary.	<ul style="list-style-type: none">• Help your Team Member secure resources or opportunities to accomplish their goals (training, new assignments, people to contact).• Check-in informally on a regular basis to find out how much progress has been made.• Hold to your scheduled meetings with your Team Member to track progress and coach as necessary.

Development Activities

Most people learn most effectively and long-lastingly by doing. Research tells us that activities most likely to be effective to develop people have many of these qualities:

1. They target building on strengths, or developing skills, that have been selected based on accurate self-assessment combined with candid feedback from as wide a range of sources and relevant perspectives as possible.
2. They provide an opportunity to engage in real work activities that are challenging, visible and have some risk, but also have support to allow for acceptance of mistakes as skills and competencies are learned.
3. They are not limited to one or two types of “good” development activities, but can be drawn from a variety of types of activities. As long as they do not target too many different skills or abilities at once, and are practical and doable.
4. They resonate with the individual who owns the IDP, so the individual knows these are the right areas to target, and genuinely cares about developing them.

Work related activities do not generally offer development in only one or another skill or competency areas. This means you will bring your focus area to the activity to make sure you use it well to provide the growth you are looking for. Below is a list of activities that can be used to target specific competencies for development.

- Present at or take a lead a call
- Take on a significant role for a task/project/activity that crosses departmental boundaries.
- Mentor someone in the company.
- Do an informational interview with someone whose role interests you, and discuss what you learned with your manager.
- Do research on a topic in Squish U that interests you and is related to your IDP and present your findings to your manager.
- Teach someone a skill or area of expertise you possess.

Individual Development Plan

Example

Name	Plague Doctor	Date	11/01
Professional Goals/Motivations			
What are my professional growth and career aspirations? How do I think these aspirations can best be met?			
I'd like to be using my knowledge in accounting in a more senior role- maybe in 3-5 years. This could be at the manager level, where I could influence decision- making and contribute to better financial planning and budgeting processes across the company.			
Talents or Strengths to Use More		Development Opportunities	
What are my talents and strengths?		What knowledge or skills do I need?	
<ul style="list-style-type: none">• Accounting knowledge• Ability to explain finance info to non-financial people• Strong analytics• Skilled presenting data visually in clear-compelling manner		<ul style="list-style-type: none">• Need experience managing people• Lean how to effectively delegate	
Focused IDP Objectives and Actions Steps			
What development goals do I have for the next 6 months? The next 3 years? What specific actions can I take to achieve these goals?			
<ul style="list-style-type: none">• Present at 2 or 3 finance meetings• By 2/1: Create a plan to delegate ongoing analytics to junior accountants. Set-up schedule for before and after delegation meetings.• By 5/1: Research new automation platform to present to the finance committee.• Ongoing: Meet monthly with my manager to review challenges and progress- get coaching			
Next Review Meeting Date		01/03	

Individual Development Plan

Name		Date	
Professional Goals/Motivations			
What are my professional growth and career aspirations? How do I think these aspirations can best be met?			
Talents or Strengths to Use More		Development Opportunities	
What are my talents and strengths?		What knowledge or skills do I need?	
Focused IDP Objectives and Actions Steps			
What development goals do I have for the next 6 months? The next 3 years? What specific actions can I take to achieve these goals?			
Next Review Meeting Date			