

*Sample*

# *American Company*

## **Individual Development Plan** Jane Smith, Sales Manager

**Confidential**

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## Overview

This plan is a summary of your strengths, career directions, and areas on which your development will focus.

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### Effective Plans Are...

- ▶ Relevant to your organization's needs
  - ▶ Based on an objective, accurate assessment of strengths and needs
  - ▶ Focused on challenging development activities targeted to your needs
  - ▶ Inclusive and tap others for coaching and feedback on progress
  - ▶ Driven by you—you own the plan and implement it
  - ▶ Best seen as a journey, not a destination
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## 4 Pieces of Information

When building the plan, these four critical areas are considered and included into the development plan. This information can be identified collaboratively by the employee and his or her supervisor.



## Building the Plan

This section provides additional information as well as best practices to consider when creating individual development plans.

**Developmental objectives:** These describe the specific areas for development.

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**Best practices for identifying objectives:**

- ✓ Limit your developmental objectives to one or two
- ✓ Focus on changes in knowledge, skills, or behaviors

**Action steps:** These provide the experiences and practice needed to develop.

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**Steps might include:**

- ✓ Further clarification or feedback
- ✓ Actions to be taken within your present job assignment
- ✓ Additional responsibilities or re-assignments
- ✓ Coaching and training
- ✓ Progress reviews with your boss or others at regular intervals

**You will benefit most from action steps that:**

- ✓ Place you outside your comfort zone
- ✓ Provide a diversity of experiences that will broaden your skills and perspectives
- ✓ Improve awareness of your impact on others
- ✓ Give practice needed to perform new skills even under stress
- ✓ Include assignments where either success or failure is possible

### Measure your progress

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Included in your plan ways to measure your progress. This should include regular reviews of your plan with your boss, your coach, or any other appropriate people.

## Towering Strengths

| <b>Competency</b>                        | <b>How it is Expressed</b>  |
|--|---|
| 1. <b>Strategic Thinking</b>             | Able to create strategies and plans to achieve business objectives. Understand the big picture and all the forces at work.                |
| 2. <b>Analytical Thinking</b>            | Apply disciplined market and competitor analysis to identify sales opportunities and focus efforts for maximum impact.                    |
| 3. <b>Leadership/Working with Others</b> | Understand and communicate the vision and business objectives to the team. Motivate others to make sales and achieve business objectives. |

## Career Goals

| <b>Timeframe</b>           | <b>Career Path Goals</b>                         |
|----------------------------|--|
| <b>Next 1-2 years</b>      | Demonstrate value and success as Sales Manager   |
| <b>Next 3-5 years</b>      | Advance to Vice President of Sales and Marketing |
| <b>Long-term, 5+ years</b> | Advance to President                             |

*Note: These goals are based on present circumstances and are open to modification.*

## Developmental Needs

### **Specific Areas for Development**

1. **Improve individual performance management skills so I can better manage my sales force.**
2. **Expand working relationships with peers.**
3. **Strengthen creative thinking.**

# Developmental Objective #1

## Objective

Build a high performance work environment for my sales team that fosters accountability, creativity, and professional growth.

## Action Steps

| Action  | Deadline  | Progress |
|---|-----------|----------|
| 1. Transform current job descriptions and department goals into a performance management system that ties individual responsibilities, actions, and results to measurable business objectives. Consult boss and HR group regarding this action step.            | End of Q1 |          |
| 2. Establish 1:1 meetings at least monthly that enable direct reports to evaluate progress, seek insights and feedback, and adjust activities.  | End of Q1 |          |
| 3. Hold biweekly team meetings to encourage knowledge sharing and common understanding of progress against objectives. Also use these meetings to have fun and foster creativity—do brainstorming, use mind-bender exercises to get us thinking out of the box. | End of Q1 |          |
| 4. Work with direct reports to create individual development plans utilizing HR organization and tools (like this template).  | End of Q2 |          |
| 5. Talk with HR department about training programs, either in-house or out, that will help me take performance management to the next level.  | End of Q4 |          |

## Evaluation

Review plan quarterly with 1:1 meetings with boss.

## Notes

Jane Smith, Sales Manager

## Developmental Objective #2

### Objective

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Broaden my in-house network while at the same time adding value to the company (so that this is not just a social exercise).

### Action Steps

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| Action   | Deadline  | Progress |
|--|-----------|----------|
| 1. Work more closely with Rob and his organization. Ask Rob to assign me to a specific project within his organization where my marketing skills compliment the production team. | End of Q1 |          |
| 2. Serve on a regional cross-functional committee over the next year. Ask Frank for an appointment   | ASAP      |          |
| 3. Expand network through two informal lunches per month with members from different functional organizations to learn new approaches to business opportunities.                 | End of Q2 |          |

### Evaluation

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Review plan quarterly with 1:1 meetings with boss.

### Notes

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Jane Smith, Sales Manager

## Developmental Objective #3

### Objective

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Strengthen creative thinking skills to make decisions without complete reliance on data.

### Action Steps

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| Action  | Deadline  | Progress |
|---|-----------|----------|
| 1. Develop a consulting relationship with Glenn to learn how he thinks business opportunities. Get into his head about how he thinks about making decisions and how he uses his instincts.  | End of Q2 |          |
| 2. Attend this year's industry conference and have a veteran provide a tour and overview. Identify top products and what makes them number one. Write a one-page summary of findings, including implications for either my group or the company as a whole. Review this with my boss and at least 2 other people. | End of Q3 |          |

### Evaluation

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Review plan quarterly with 1:1 meetings with boss.

### Notes

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- Step 1 ties in with the networking lunches described in objective 2
- Submit travel request for sales conference