

# MAKING IT HAPPEN!

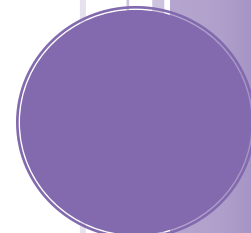
## *Employee Version: A Guide to Performance-Driven Development Goal-Setting*

*Individual Development Planning is a process for identifying work experiences, training, and other activities that contribute to one's development and job performance. Individual Development Planning helps you to establish development goals based on your strengths and development needs, explore activities and resources that lead to development, and establish a plan of action to achieve your development goals. This eGuide provides a comprehensive, step-by-step resource to support the individual development planning process, thereby enhancing your growth and development.*

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## Introduction

Individual Development Planning is a process for identifying work experiences, training, and other activities that contribute to one's development and job performance. It builds directly on the performance management process, which helps you to identify strengths as well as areas in need of further development, and leads them to identify appropriate developmental activities aimed at enhancing your work performance.

Individual Development Planning has three primary goals:

1. To help you establish development goals based on your strengths and development needs,
2. To explore activities and resources that lead to development, and
3. To establish a plan of action to meet your development goals.

Continuously improving your job skills and competencies is critical to your productivity, engagement, career growth, and to company performance. This eGuide will provide you with a comprehensive, step-by-step resource to guide you through the individual development planning process.

*The Individual Development Planning Framework* shown on page 3 provides an overview of the steps in the development planning process, and outlines the responsibilities of both manager and employee in each phase of the process.

An *Individual Development Planning Template* is provided on page 4. This template may be used to structure the Individual Development Plan (IDP) or modified to align with your company's performance management and development process.

## INDIVIDUAL DEVELOPMENT PLANNING FRAMEWORK

Creating a *powerful and actionable* IDP requires effort and input of both the employee and manager. The following table outlines the steps in the individual development planning process, along with the responsibilities for each role.

	Manager's Responsibilities	Employee's Responsibilities
<b>Step 1</b>	<b>Feedback and Development Discussion</b> Objective: Have a productive, two-way discussion, in which employee receives candid, focused feedback on performance, strengths and opportunities for improvement.	
Meeting Preparation	<ul style="list-style-type: none"> <li>Review performance, identify strengths and development needs.</li> <li>Prepare examples to support assessment.</li> <li>Seek input from others, if appropriate.</li> <li>Schedule feedback meeting with employee.</li> </ul>	<ul style="list-style-type: none"> <li>Identify key strengths and development needs.</li> </ul>
Feedback/ Development Meeting	<ul style="list-style-type: none"> <li>State goals of the meeting.</li> <li>Provide feedback on overall performance and describe future opportunities for growth.</li> <li>Identify and describe key strengths and development needs.</li> <li>Assist employee in determine 2-3 development goals.</li> </ul>	<ul style="list-style-type: none"> <li>Share assessment of strengths and development needs.</li> <li>Ask clarifying questions as appropriate.</li> <li>Ask for additional feedback or more specific examples.</li> <li>Remain open-minded and maintain a non-defensive approach to the feedback.</li> <li>Identify 2-3 development goals and preliminary action steps to be incorporated into the development plan.</li> </ul>
<b>Step 2</b>	<b>Individual Development Planning</b> Objective: Create a solid, focused, actionable development plan leveraging strengths and addressing development needs.	
	<ul style="list-style-type: none"> <li>Offer employee ideas/suggestions for developmental activities.</li> </ul>	<ul style="list-style-type: none"> <li>Clarify development goals.</li> <li>Determine action steps and resources that will leverage the strengths and improve the development needs.</li> <li>Draft a solid plan to incorporate the activities into your job.</li> <li>Seek input/advice from others.</li> </ul>
<b>Step 3</b>	<b>Follow-Up Meeting</b> Objective: Review, clarify, and commit to a finalized individual development plan.	
	<ul style="list-style-type: none"> <li>Offer feedback and suggest additional or alternative actions.</li> <li>Agree on finalized plan.</li> <li>Commit to supporting the employee through the implementation of the plan.</li> </ul>	<ul style="list-style-type: none"> <li>Present development plan to manager and ask for feedback.</li> <li>Listen to suggestions, negotiate, and discuss to reach agreement.</li> <li>Agree on finalized plan and commit to implementing the plan.</li> </ul>
<b>Step 4</b>	<b>Implementation</b> Objective: Ensure successful implementation of the development plan.	
	<ul style="list-style-type: none"> <li>Provide continuous coaching, support and feedback.</li> <li>Remove barriers to the successful implementation of the plan.</li> <li>Hold quarterly meetings with employee to review progress.</li> </ul>	<ul style="list-style-type: none"> <li>Implement performance and developmental activities.</li> <li>Complete one action item immediately.</li> <li>Schedule regular progress review meetings.</li> <li>Solicit on-going coaching and feedback.</li> <li>Overcome obstacles and celebrate successes.</li> </ul>

## INDIVIDUAL DEVELOPMENT PLAN TEMPLATE

<b>Strengths:</b> <i>What are your strengths?</i>		
<b>Development Needs:</b> <i>What are your development needs?</i>		
<b>Development Goal 1:</b> <i>What competencies or behaviors need to be developed?</i>		
<b>Development Actions</b>		
<b>Actions/Activities</b>	<b>Resources Required</b>	<b>Timeframes/Targeted Completion Dates</b>
1.		
2.		
3.		

## STEP 1: FEEDBACK AND DEVELOPMENT DISCUSSION

### Meeting Preparation

To prepare for the Feedback and Development Discussion with your manager, begin by reviewing your performance feedback over the past year including feedback you received in your most recent performance review and/or 360 degree assessment, as well as feedback received from peers, colleagues, and customers, etc.

### **IDENTIFY STRENGTHS AND DEVELOPMENT NEEDS**

To identify your strengths and development needs, you should start analyzing your performance feedback and distilling a handful of key themes from the data. Look for patterns and themes across all performance data and choose your key strengths and most critical development needs based on the feedback you have received.

#### Review Performance Notes

- *Performance Reviews* – What aspects of your performance are consistently noted as strengths? Which areas of your performance are consistently noted as development needs or areas for improvement?
- *Manager Discussions* – What type of performance feedback have you received directly from your Manager in coaching discussions, on-going

feedback sessions, and one-on-one meetings? Review your meeting notes for critical performance areas that have been previously discussed.

### Create a list of your key strengths

Based upon your analysis of your performance, make a list of your key strengths. Having a list of your strengths can be particularly helpful if you decide to create a “Use it” development goal. You will learn more about these types of goals as you continue on in this guide but in brief, this type of development plan focuses on making better use of a strength that is currently underused.

### Create a list of your development needs

Based upon your analysis of your performance and your manager’s feedback, make a list of your most critical development needs. In the next step of the development planning process, you will prioritize your development needs and select one to three upon which to focus.

### Feedback/Development Meeting

### **CLARIFY STRENGTHS AND DEVELOPMENT NEEDS**

Begin your Feedback and Development Planning discussion with your manager by describing the pre-work you have done to analyze your performance. Share your assessment of your strengths and development needs and solicit his/her thoughts on your performance. Use this time to gather additional feedback, as well as to identify areas that are of particular concern to your manager.

Although discussing developmental areas can be difficult, be sure to remain open-minded and to maintain a non-defensive approach when discussing areas for improvement or development. Keep in mind that others tend to see us differently than we see ourselves, and that taking these perspectives into account can be valuable to enhancing our performance.

### **IDENTIFY INITIAL DEVELOPMENT GOALS**

**Once you have a good understanding of your key strengths and areas for development,** you and your manager should work together to create and prioritize the list of development goals. It is important to not take on too much. People who focus on **3 or fewer** development goals are more successful at achieving their developmental objectives than those who try to execute many development goals at once.

The number of development goals that you should set for yourself depends on your response to these four questions:

1. How difficult is the need to develop (e.g., how big is the gap to the standard/norm, how complex is the competency, etc.)?
2. How much support will you have?
3. How similar are your development needs to one another? (the more similar the needs, the more you can work on at the same time because the development remedies you choose will address more than one need at a time).
4. What are you willing to do?

### **DETERMINE PRELIMINARY ACTION STEPS TO SUPPORT DEVELOPMENT GOALS**

Next, you will need to identify a few preliminary action steps that you can take in support of each of your development goals. There's no need to create a comprehensive action plan at this point; that's the next major step you will take. However, while you're still talking with your manager, it could be very helpful to brainstorm a few practical actions to get things started. With at least one action per development goal already identified, you will be ready to create your Individual Development Plan (IDP).



## STEP 2: INDIVIDUAL DEVELOPMENT PLANNING

### Setting Development Goals

#### SMART GOALS

You may already be familiar with the concept of SMART Goals – a goal setting framework that facilitates effective goal setting. You can use the SMART goal framework in creating performance goals, and also apply these same concepts to setting development goals.

Apply the concepts of SMART Goals to ensure your development plan is:

- **Specific** – Consider the details – who, what, when and how. (*What do you want to achieve?*)

*Example: Improve teamwork skills with project team members through more frequent and timely follow-up communication.*

- **Measureable** - Include a means for assessing results. (*How will you know the plan has been achieved?*)

*Example: As a result of my more frequent and timely follow-up communication, team members will provide me with feedback indicating I have improved my teamwork skills.*

- **Achievable** – Consider available resources and potential constraints. (*Is the goal realistic?*)

*Example: I may not have the opportunity to follow up with all team members in person due to the distribution of the team in different countries and time zones. To address this constraint, I will follow up with team members with whom I cannot follow up in person via phone and/or email.*

- **Relevant** – Goals must be related to the department's or company's strategic objectives. (*Why is it important for me to focus on this development area?*)

*Example: Achieving our company's global goals requires a high degree of coordination and collaboration, which in turn necessitates effective teamwork and communication within our team.*

- **Timely** – Always include a deadline. (*When will you start? When should the goal be achieved?*)

*Example: During Month 1 and 2, focus on daily email communications and weekly/monthly meetings setup. Feedback from team members to be gathered at the end of Q1. Overall goal achievement by the end of Q2.*

#### TYPES OF DEVELOPMENT GOALS

Development goals can be focused on improving skills and behaviors related to your current role, leverage strengths, and/or developing new skills for a future role. Your IDP can include any or all of these goal types.



### **“Do better” Goals**

“Do better” goals are aimed at taking performance to the next level. You should set this type of development goal to become more effective at something that you have not yet mastered in your current job.

Example "Do better" development goals include:

- *Become more effective at managing time*
- *Improve ability to communicate to a variety of audiences*

### **“Use it” Goals**

This type of development goal focuses on making better use of a strength that is currently underused. For example, you may be a very capable project planner, but your current job does not involve much project planning. Developing a "Use it" goal to either maximize this skill in your current job or offer it in other projects within the organization will help you and the company realize your full potential. For example, you may participate in a task force or special committee to take advantage of this particular skill.

Example "Use it" goals include:

- *Leverage ability to plan projects*
- *Make better use of public speaking skills*

### **“Get ready” Goals**

A “Get ready” development goal focuses on developing a skill that is not required in your current job but that will be required in some future role to which you may aspire or be assigned. For example, a development goal might

entail learning about strategic management in preparation for moving into a managerial role where strategic thinking is required.

Additional examples include:

- *Become proficient at a software program*
- *Learn strategic planning*
- *Gain confidence in leading others*

## **Determining Action Steps and Resources**

Development Actions are the specific things that you will do, as part of your development plan, to achieve the desired behavior change.

### **TYPES OF DEVELOPMENT ACTIONS**

There are several kinds of actions, one or more of which may be appropriate for your specific development need/s.

Types of Development Actions include the following:

#### **Self-Development**

There are several kinds of self-development actions that you may want to consider.

- Reading selected books that relate to your development goal can help you increase your knowledge, gain a new perspective, or enable you to learn the basics of an unfamiliar field.
- Observing others who have considerable expertise in a skill or area in which you need to grow and develop can be extremely valuable. Consider speaking with individuals such as your direct manager, peers, other colleagues, and industry



experts to learn from their experience and to gain from their insight. You might also develop a list of people to interview for ideas and alternative approaches.

- Attend professional association meetings or conferences to keep up to date with the latest thinking and trends in your field.

### **Training Workshops**

Participating in training workshops and seminars is another way to improve technical or leadership skills. Work with your manager to identify programs that will meet your specific needs. Some examples include:

- Leadership Development Programs
- Sales, Service, and Marketing Training Programs
- Technical Training Programs

### **Feedback and Coaching**

Actively seeking feedback is highly developmental, and can be very valuable if you are truly open to listening and taking action to improve.

- Boss, peer, or colleagues can observe your performance or behavior and provide feedback
- Self-assessment instruments and 360 feedback tools can provide valuable insights and help you identify themes and trends in your performance and behavior, and help you determine if you're actually making progress against your development goals
- Business partners and customers can be valuable sources of feedback and coaching as well.

### **Skill Practice**

Another type of development action is practicing the new behaviors associated with a development need in a safe environment.

- Practice presenting your ideas with enthusiasm in front of the mirror at home
- Work with a trusted colleague or family member on improving a skill such as listening with empathy

### **Developmental Assignments**

For some development goals, the employee will need the opportunity for a special assignment, or the opportunity to take charge of a project, in which he/she will be required to learn and use new behaviors. Special assignments or projects should be challenging, designed to force an individual out of their comfort zone and stretch his/her skills. It is under these conditions that significant development often occurs.

- Take the lead on a special project, including budget responsibility
- Represent the functional area on a strategy task force/team
- Install a new system/process/procedure
- Manage a cost containment/reduction effort
- Improve a process or system
- Conduct a competitive analysis
- Take on a responsibility that is opposite of the current role

### **LEVERAGE AVAILABLE RESOURCES**

Development resources help to prepare you for making behavioral changes on the job. Some resources help you to learn new bodies of knowledge. Some resources help

you to learn new ways of doing things. Lastly, some resources allow you to experiment with new behaviors in a safe environment. Resources include books, videos, on-line courses, training programs, and college courses. Some resources require time or a financial investment; you should be sure to discuss them with your supervisor to secure his or her support and commitment.

### ***SEEK INPUT FROM OTHERS***

Keep in mind that some of your best resources may be colleagues. Ask yourself if there is an individual who is particularly strong in your development area and who would be willing to serve as a mentor and guide to you as you execute your development plan. This individual may be a resource for helping to evaluate the effectiveness of your plan as well as for receiving ongoing feedback and valuable tips along the way. Additionally, simply sharing your development plan with him/her is a great way to hold yourself accountable for taking action.

## **STEP 3: FOLLOW-UP MEETING**

### **Review, clarify, and commit to a finalized Individual Development Plan**

Once you have a written plan to share with your manager, schedule a follow-up discussion to present and solicit feedback on your IDP. Describe the process you utilized to decide upon the action steps and required resources that will support execution of your development plan. Use this time to discuss the resources you have identified and to obtain sign-off if necessary from your manager.

Collaborate with your manager to incorporate his/her suggestions for the execution of your development plan and agree on a finalized plan. Be sure to discuss the timeframes around each development activity, and commit to the deadline for plan completion.

## **STEP 4: PLAN IMPLEMENTATION**

Once your plan is finalized, it is your responsibility to ensure that it is effectively implemented. Development will not happen unless you make time for and devote energy to it. Remember that to obtain visible and observable growth and development, you need to regularly execute on your action items, follow through despite obstacles and setbacks, and meet your pre-established timeframes for deliverables.

To keep your development top-of-mind, despite your many responsibilities, consider the following:

### **Complete one action item immediately**

Small steps towards goal accomplishment will motivate larger gains towards your entire development plan. Be sure not to delay focusing on your action items until you “have more time”, as your development plan will likely be pushed back indefinitely. Instead, pick the “low-hanging fruit” by reviewing your plan to identify something you can do today to get started.

## Schedule regular progress review meetings

Work with your manager to schedule regular progress review meetings to discuss your development plan accomplishments as well as any challenges or issues that are hindering your progress. Many people have found that a quarterly progress review meeting gives enough time to generate traction on their development activities and begin demonstrating results, while still allowing for a sufficient frequency to head off any obstacles that are slowing execution.

During these meetings, discuss these challenges with your manager and present some contingency ideas you have for moving forward. Solicit your manager's thoughts on the obstacles and contingency plans and gain his/her buy-in for a new approach, if necessary.

## Solicit on-going feedback and coaching

As you implement your IDP, remember to regularly ask for feedback and coaching from your manager. One of the most valuable aspects of receiving feedback from someone else is perspective.... they may see things differently than you, or they may see different things than you see. Having a change of perspective can often bring about new insight, or lead you to approach a goal or problem with a new attitude. Even the most accomplished athletes or musical performers work with coaches on a regular basis, to continuously improve their skills, so don't hesitate to ask for feedback and coaching as you strive to enhance your skills and performance.

## Overcome common obstacles

Three of the most common obstacles people face in the development process are: (1) too little time, (2) lack of support, and (3) resistance to change. Listed below are some suggestions of things you can do to overcome these obstacles:

- **Do something every day.** With most development plans this is not a problem. Opportunities arise every day to engage in the new behavior, to try it out, to practice in real time on the job.
- **Set aside time.** If you can't find the time, figure out why. Identify something that currently takes up time that is of less importance than the success of your development plan, and slip a development action in its place. Let something else slide and give one of your self-development activities a high priority.
- **Set incremental goals.** Use development-plan "mileposts" as the basis for incremental goal setting. Track your progress on Day 5, for example, and set a goal to improve upon it by Day 10.

## Celebrate successes

Make sure you reward yourself when you complete your development plans. Whether it's taking yourself out for dinner or purchasing something that you have had wanted for some time, rewarding yourself for progress is very important. Making changes in your behavior is not

always easy, but it can be one of the most rewarding things you experience in your career.

### **Next Steps**

Human Resources software can facilitate and enhance the individual development planning process by helping managers collaborate online with employees, as well as document progress and feedback. Consider using a technology solution like the one offered by viaPeople, Inc. to link development planning with the performance management process. [Click here](#) to learn more.

## About the Authors

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One of the founding members of viaPeople, Dr. Karen Caruso brings expertise in helping organizations achieve their strategic goals by maximizing the potential of their human capital. As Director, Karen leads viaPeople's team of Industrial Organizational Psychologists, contributes to the development of innovative products that meet emerging customer needs, and manages solution alliance relationships.

Dr. Caruso has focused her career on partnering with clients to design and implement innovative performance management, career development, and succession planning systems. She has spoken at seminars and national conferences on the implementation of best practice performance management strategies. Karen has extensive experience in developing competency models that form the foundation for sound, integrated human resource systems. As a trusted advisor and coach, she works closely with managers and executives in identifying and leveraging their talents, as well as improving in their areas for development. Please contact Karen by email at [kcaruso@viapeople.com](mailto:kcaruso@viapeople.com), and for more information go to [www.viapeople.com](http://www.viapeople.com).

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