

# Individual Development Plan Template

## Introduction

The most significant mind shift most companies must make regarding performance assessment is to move to mutual understanding. All too often we treat performance assessment as a one-way monolog as we rattle off all the things we want to see changed.

**"Watch, learn, and get stuff done."** Young entrepreneurial organizations develop employees by osmosis. Watch how I/we get stuff done and go do the same. If you don't get a lot of stuff done, we'll find someone else who can. It's an effective approach, particularly with regards to maximizing time spent "doing."

**"The scripted monolog."** More mature organizations over-correct this laissez-faire approach and create a performance assessment program that is so scripted and routine you don't even need to do it live or in-person. You can pre-record it and set it to repeat->infinite.

**"The sweet spot."** The best performance assessment programs are specifically designed around the keystone of mutual understand. Do we as management know how to create the environment you as employees need so that we can all reach our shared goals. Do you as an employee know what our shared goals are and how your performance and behavior either contribute to or detract from the achievement of those goals.

## The development plan

The development plan is where the rubber meets the road, and the real work is accomplished. You can talk until everyone is blue in the face, but nothing will come of all that time unless there is a clear action plan. The following pages include worksheets for both the Annual Performance Review and the Quarterly Planning Session.

If you're ready to shift to a "mutual understanding" approach to performance assessment, these sample worksheets will give you a jumpstart on creating, implementing, and following through on your developmentally-based performance assessment program that will help drive your organization to Predictable Success faster than ever.

# Annual Performance Review

**Employee:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Manager:** \_\_\_\_\_

**Long Term Career Objectives** \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

## Last Year in Review

### SMART Goals for the Previous Year

**Goal #1:** \_\_\_\_\_

**Goal #2:** \_\_\_\_\_

**Goal #3:** \_\_\_\_\_

### What went well?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

### What can be improved?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## Planning The Year Ahead

### Applicable Organizational Objectives

#1: \_\_\_\_\_

#2: \_\_\_\_\_

#3: \_\_\_\_\_

### Individual SMART Goals

Goal #1: \_\_\_\_\_

Goal #2: \_\_\_\_\_

Goal #3: \_\_\_\_\_

#### Key Behaviors

Goal #1: \_\_\_\_\_

\_\_\_\_\_

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Goal #2: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Goal #3: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### Critical Milestones

Goal #1: \_\_\_\_\_

\_\_\_\_\_

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Goal #2: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Goal #3: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

#### Follow-up Dates

Goal #1: \_\_\_\_\_

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\_\_\_\_\_

Goal #2: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Goal #3: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

### Additional Notes

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\_\_\_\_\_

# Quarterly Planning Report

Employee: \_\_\_\_\_

Date: \_\_\_\_\_

Manager: \_\_\_\_\_

## SMART Goals for the Previous Quarter

Goal #1: \_\_\_\_\_

Goal #2: \_\_\_\_\_

Goal #3: \_\_\_\_\_

### What went well?

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### What can be improved?

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## SMART Goals for the Upcoming Quarter

Goal #1: \_\_\_\_\_

Goal #2: \_\_\_\_\_

Goal #3: \_\_\_\_\_

## Additional Notes

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