

# Personal Development Plans

**create  
finance**



# The PDP

Employees who seek development outside of their current role and who are consistently performing well or over performing in their role should have long term development goals recorded on a PDP or Personal Development Plan.

These PDPs should be reviewed regularly and 'owned' by the staff member as they should be working towards their objective(s).

The PDP utilises the GROW model to build actionable mid to long term goals for employees to work towards and encourages them to take ownership of this process with their manager as a 'guide' or mentor.

Overperforming employees should have actions that progress them into their next role, challenge them in their current role further, or turn them into expert role models to support the growth of others on your team.

As a PDP should primarily be 'owned' by an employee and 'curated' by a manager, this guide has been written so that you can share it with your employees to better support their development.

# The GROW Model

The PDP contains only four sections, following the GROW development model:

## Goal

*What is your aim? What are you going to achieve? What achievement will signify ultimate success?*

## Reality

*Where are you at right now? What skills do you already have that help you on your journey?*

## Objectives

*To achieve your goal, what, **specifically**, are you going to do? What will support you on that journey? What improvement/changes will you see in your abilities?*

## When? (Referred to as Deadline/Timeframe)

*When are you going to complete your individual objectives by?*

# Goal Building



Get the goal right and you're half way to building an effective PDP. When creating a development goal remember the following key points:

**Make it relevant to the business.** Set a development objective that is of benefit to the group as well as your personal growth. You'll find it easier to get support within work if there is a need for you to attain the skills required to achieve your goal this way.

**Make the goal specific.** *"Improve my influencing skills"* is lacking in a few areas.. Is the cause of the development a lack of confidence in verbal communication or is it a lack of evidence and facts supporting the influencing process? We don't know, and that's the problem. Finally, this objective is so broad it has the potential to overwhelm. You may not really know where to focus first and may therefore struggle to commit to action.

**Aim High.** Climbing Mt Everest is just the end result of putting one foot in front of the other. Don't limit yourself to only what you feel you can quickly and easily achieve. Long term goals will have more objectives to achieve but are vastly more rewarding when completed.

At this stage we are only interested in making the goal to give us the best possible start. We have still yet to develop objectives and timelines etc. Once you have a goal, this should be recorded in the first section of your PDP.



# Assessing your Reality

If we continue with our Mt Everest metaphor, ask yourself...if you want to climb it, how close to the mountain are you right now? Merely climbing to the summit is the culmination of dozens of individual actions, some of which a climber may already have completed before they set out.

In other words you will possess pre-existing skills that may support your goal. Realising and recognising these moves you closer to your goal.

There are a number of ways you can assess your current reality:

- Feedback from your manager
- Feedback from peers, including 360 Feedback
- SWOT Analysis
- Analysing job descriptions/ best practice

Consider your goal, then in the Reality section of your PDP, define the skills, abilities, resources and tools currently at your disposal that support your goal.

# SWOT Analysis

SWOT Analysis is a useful technique that helps you add to both your reality section and your objectives section. What makes SWOT especially powerful is that, with a little thought, it can help you uncover opportunities/ skills etc that you would not otherwise have spotted. Also, by understanding your weaknesses, you can identify objectives that will support you moving forward.

## Strengths

Consider your strengths from both an internal perspective, and from the point of view of your customers and people in your team/ business area.

## Weaknesses

Again, consider this from an internal and external basis: Do other people seem to perceive weaknesses that you don't see? Are your colleagues doing any better than you? It's best to be realistic now, and face any unpleasant truths as soon as possible.

## Opportunities

A useful approach when looking at opportunities is to look at your strengths and ask yourself whether these open up any opportunities. Alternatively, look at your weaknesses and ask yourself whether you could open up opportunities by eliminating them.

## Threats

Don't think in terms of 'danger', instead look at the limitations you have on your development. For example, we would all love to spend 100% of our time working towards our growth but this cannot always happen, protecting your development time means knowing what could threaten it.



# Objective Planning

The next thing to do is create objectives that will lead to the achievement of your overall goal. Each objective should be a step along the path to achieving the goal.

Break down your goal into steps along a path. Then go in and break each of those steps down into an actionable objective, something that with support you can realistically achieve. These should be SMART in their make up. For a PDP you should expect to have around 3-5 objectives at a time.

That isn't to say that your goal will be complete in 3-5 steps. If your goal requires additional steps you will need to prioritise your objectives. What will you need to do first? What happens after that? If you can't prioritise easily, then pick the most achievable objectives first to get you going.

# The SMART Model:

# For Building Robust Actions

## Specific

What will you do SPECIFICALLY? It's no good to use words like *improve, change, more of, less of* without an actual, measurable figure attached to this.

*E.g. I want to improve my NPS score to be in line with or above the team's average of 8.2.*

## Measurable

How will you, know when the goal has been achieved? How will you measure success? What need to be achieved?

*E.g. I will need to improve my current NPS by 2.3 over the next month.*

## Achievable and Realistic

Is the goal achievable? Is this in line with the business needs/ goals? Can you reasonably be expected to hit the target/ goal?

*E.g. I know this is achievable as I have previously attained this score over the last quarter.*

## Timebound

By what date should we reassess these goals and the achievement against them? Ideally you want to check that you're 'on track' mid way through the objective to ensure you are still capable of achieving, so detail any touchpoints you have planned.

*E.g. By the end of week two I will check in to ensure I have made an improvement of no less than 1.5 and then again at the end of the month to ensure I have met my target.*



# Timescales

A hand is pointing at a map of a region in Poland, with a camera lens in the foreground. The map shows towns like WEGORZEWO, GIZYCKO, and KATYNO. The word 'Timescales' is written in large, bold, teal letters across the top of the image.

Once you have your objectives in place you should commit to timescales/ deadlines.

There are a few things to be wary of when setting timescales for a PDP. Don't create them in isolation of each other. There is a bit of a tendency to end up with timescales that all converge at the same point.

Once you've set each of the dates go back over them and sense check that they fit together and make it still realistically achievable.

You then need to diarise regular reviews of your PDP with your manager, ideally these should be monthly.

Each review gives you the opportunity to check that the PDP objectives are still achievable against the current workload you have and seek advice and support from your manager.

## Personal Development Plan

Staff Member	Joe Bloggs
Supervisor	Jane Doe

### Initial Personal Development Plan

Goal	Reality	Objectives	Deadline/ Timeframe
<p>Set your overall objective(s). These should be short, sharp and clear.</p> <p><u>Eg:</u> What is your overall aim? What are you hoping to achieve?</p>	<p>What is your current reality? What is actually, factually going on that supports your Goal?</p> <p><u>Eg:</u> Where are you at right now? What have you already done?</p>	<p>What do you want to do? What can your TL do to support?</p> <p><u>Eg:</u> Break down what you're going to do into smaller objectives. How are we going to do that?</p>	<p>Ensure you set a timeframe for your objectives.</p> <p><u>Eg:</u> When are we going to do that?</p>
<p><b>To become a deputy team leader in my department.</b></p>	<p>I have previous experience as a deputy team leader (2015-2016) but not in this industry so I feel I have performance management skills but these need refining.</p> <p>I have been conducting my team leader's huddles under their supervision (Dates) and have received positive feedback.</p> <p>I have been coaching 2 underperforming members of the team (Dates) and have improved their performance by (Metric).</p>	<p>To get a place on the TL development course with L+D to grow my skills before applying them on my team.</p> <p>To get on the course I will need to:</p> <ul style="list-style-type: none"> <li>- Complete my PDP and submit to L+D</li> <li>- Produce a 15 minute presentation on performance coaching to be assessed by L+D – I will link in with my TL for feedback</li> <li>- Practice my interview skills with TL</li> </ul>	<p>- Deadline is next week, this will be reviewed by 01/01/2017</p> <p>- I will produce a first draft by 07/01 and then review with my TL, then make amendments and present to TL 14/01</p> <p>- I will practice with TL before 14/01</p>
Signed Staff Member		Signed Supervisor	
Date		Date	01/01/2017
Date of Next Review	01/02/2017		

# Progressing a PDP

Once you have set your PDP, you own the document and take responsibility for recording your progress.

As you achieve **Objectives**, they become your new **Reality** and should be moved into the appropriate column. When you move them across, record your achievement and give dates and metrics as appropriate.

As you complete objectives, you should add new ones to complete, set **Timeframes** and review with your manager. This moves you closer to achieving your **Goal**.

Every time you review and record new entries on your PDP, use another sheet (entitled Ongoing Personal Development Plan) to make it easier to read. Your PDP, especially the **Reality** column, should read like a story of how you moved closer to your **Goal**.

Completing a PDP in this way means at each review you can discuss your wins, learns and focuses for the next period rather than trying to remember during your review what has been done previously.

## Ongoing Personal Development Plan

Goal	Reality	Objectives	Deadline/ Timeframe
<p>To become a deputy team leader in my department.</p>	<p>I have been conducting my team leader's huddles and have run a 15 minute buzz session for senior managers this month (Date)</p> <p>I have secured my place on the TL development course and covered coaching and action planning this month (Date).</p>	<p>To apply my Coaching skills to support my team.</p> <ul style="list-style-type: none"> <li>- I will plan this month's coaching activity for two underperformers with my manager and then implement this under their supervision with the aim of improving their (Metric) by (Value).</li> <li>- I will seek feedback from anyone I coach to then work on this with my manager.</li> <li>- I will complete my pre-course work for the next TL dev session on (Date)</li> </ul>	<ul style="list-style-type: none"> <li>- By 07/02</li> <li>- I will collate and hand to TL by no later than 20/02</li> <li>- Next session is 07/02</li> </ul>

Signed Staff Member		Signed Supervisor		Date	01/02/2017
Date Of Next Review	01/03/2017				

# Pausing a PDP

PDPs are designed to push you to the next level of performance so that you can progress into a new role or gain new experience in support of the company.

If your performance in your current role drops below a level your manager feels is appropriate, you may find that your PDP is placed on hold whilst the focus shifts to helping you attain your previous level(s) of performance.

Don't think of this as punishment, as that's not what it is. You need to be achieving in your current role in order to be considered for a new one, so if you do find that you are underperforming, its only sensible to address that issue before restarting your PDP.

# Key Learns



## **PDPs are for high performing employees**

Not every staff member should have a PDP as it may not be appropriate. Staff who are part of the Appraisal Process will find a PDP incredibly useful for helping them achieve bonus.



## **Employees 'own' their PDPs**

Managers should not fill out PDPs for employees as it is their job to document and evidence their own development for review.



## **A PDP should act as a chronological log of events leading to a goal**

A stranger should be able to review a PDP and follow the progress of an employee through the entries recorded.