

Personal development template

Give your employees a template like this to start crafting their own goals and aspirations for personal and career development. Establish a regular meeting cadence between team leaders and their direct reports to review this information and track progress. This helps employees see how they're progressing and gives team leaders insight into how they can best mentor, manage, and hold their team members accountable.

Your company

- What company product/service do you feel you need more background knowledge of?
- What areas of the company do you feel less knowledgeable about?
- Rate yourself on a scale of 1-5 (1 is "needs work" and 5 is "crushing it") for each of the company's core values. List any item that's <4 and describe what you need to improve.

Behaviors

- Based on your native behaviors, what do you think you need to work on to be at your best and provide the most value to the company?
- What activities (communications, presentations, recognition, managing up/down/across, building relationships, etc.) do you think you need to get better at?
- How do you think you can adapt your behaviors or use your superpowers to better support your team, your manager, or other departments?

Role

- How are you doing in your current role? What are you doing well? What could you get better at?
- List your core responsibilities and rate yourself on a scale of 1-5 (1 is "needs work" and 5 is "crushing it"). List any item that's <4 and describe what you need to improve.

Career goals

- Craft a statement of what your 5-year goal is (e.g., "I see myself in a senior management role where I am overseeing operations of the team and managing/motivating others to be great. My job title would be manager or director of...").
- Based on that statement and where you are in your career today, what other roles do you think you need to hold to gain the experience needed to reach your goal?
- What projects or activities do you need to complete or participate in to get there?
- Education: Are there any certifications, courses, or grad school work that would help?
- Conferences: Which conferences should you attend?

- Networking groups: Are there meet-ups, local associations, etc. you could join to start building a network and connecting with others in that role?
- Mentors: Who are the internal/external mentor candidates who could potentially help you achieve your goals?
- Management vs. individual contributor: What path is right for you? If management, how can you start to delegate activities, manage others, etc.? If individual contributor, how do you manage expectations and communicate across departments?
- Regardless of path, what does leadership mean in this role? How can you rise up as a leader and get others to align with your goals?
- Reading: What magazines, articles, and books should you read to get up to speed and stay current on what's going on in your industry and profession?

Life/health

- What goals (save money, buy a house, get a pet, travel, run a 5K, learn to paint, etc.) do you have? What will be the most difficult part about achieving them?
- What activities (go to sporting events, playing in a band, meditating) outside of work will increase your quality of life?

What to do after you've answered the above questions

- Select at least one item from each section that you would like to tackle in the upcoming calendar year. Get with your manager to align on that list and create concrete steps you will take each month, quarter, and year to get there (SMART goals).
- Meet with your manager monthly to review, track progress, add action items, adjust, realign, and watch your greatest dreams come true!