



CAREER PLANNING TEMPLATE

HELPING BUILD SUCCESSFUL CAREERS



Purpose: To create a plan that will take you where you'd like to go.

Directions:

1. Using this form as a template, develop an action plan for each goal identified. If you like, you can modify this form to meet your own specific needs.
2. Set it aside, though refer back to it often to keep yourself focused and monitor your progress.

PERSONAL INFORMATION

NAME	<input type="text"/>	POSITION	<input type="text"/>
DEPARTMENT	<input type="text"/>	MANAGER	<input type="text"/>
DATE	<input type="text"/> M M D D Y Y Y Y	PLAN PERIOD	<input type="text"/>

WHAT DO YOU WANT TO ACHIEVE IN YOUR CAREER, BE SPECIFIC?

In 1 year	<input type="text"/>
In 3 years	<input type="text"/>
In 5 years	<input type="text"/>

What goals do you need/want to achieve during this planning period? This should relate in some way to your company's goal, your department, your role now, and where you want it to be.

SMART* GOALS


ACHIEVED

1.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
5.	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

* Start setting those all-important goals and break them down into the bite-sized steps required to get there. Be SMART:

When setting your goals, we encourage you to employ the **S.M.A.R.T** technique.

→
All of your goals should be:

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- S:** Specific (or Significant)
 - M:** Measurable (or Meaningful)
 - A:** Attainable (or Action-Oriented)
 - R:** Relevant (or Rewarding)
 - T:** Time-bound (or Trackable)

POSSIBLE OBSTACLES TO YOUR GOALS

1.
2.
3.
4.
5.

POSSIBLE SOLUTIONS

1.
2.
3.
4.
5.

WHAT TRAINING OR PROFESSIONAL DEVELOPMENT MIGHT YOU NEED?

1.
2.
3.
4.
5.

WHAT SUPPORT DO YOU NEED FROM THE BUSINESS/YOUR MANAGER?

1.
2.
3.
4.
5.

STEPS REQUIRED TO ACHIEVE YOUR GOALS	KPI	TARGET DATE	REVIEW DATE	DATE COMPLETE
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

SCHEDULE*, WHEN WILL YOU COME BACK TOGETHER TO DISCUSS THIS PLAN?

Monthly	We suggest a regular monthly catch up, to discuss how things are going.
Quarterly	Set a more formal quarterly meeting and go through the plan
6 months	At the halfway mark, conduct a formal review.
Annual	At year-end, conduct a formal review. Did you achieve your goals?

It's important to regularly check in on career plans and asses KPIs. As ratings and performance are linked to career development and remuneration, the objective is to align expectations so when you conduct a formal review, there are no surprises on either side.

PERSONAL FIVE-YEAR PLAN

Purpose:

To identify where you'd like to be in five years, and determine the steps to take to get there.

Directions:

1. In the box marked "Five-year goal," describe what you'd like to achieve within five years.
2. In the rows below, you'll find boxes labeled "benchmarks." These are the yearly accomplishments you'll achieve on your way toward fulfilling your goal. In the boxes marked "action steps," write out the moves you will make to achieve the benchmarks.

DATE

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
M	M	D	D	Y	Y	Y	Y

The five-year goal, as above:

Year 1 – Benchmarks

Action steps

Year 2 – Benchmarks

Action steps

Year 3 – Benchmarks

Action steps

Year 4 – Benchmarks

Action steps

Year 5 – Benchmarks

Action steps

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