

Personal Development Plan (PDP) Conversation Guidance for Managers



OVERVIEW

Effective leaders continually identify development needs through coaching conversations. These can be part of Cme Check-ins or less formal, as-needed feedback. Part of the coaching process is the completion of a personal development plan and is considered coaching for success.

COACHING FOR SUCCESS: Guiding people toward success in a new or challenging situation. This is done proactively, before people are asked to handle a situation or task or during their early attempts.

APPROACH

- **CONVERSATION PROCESS:** Discovery, Action, and Validation
- **KEY PRINCIPLES:**
 - Maintain or enhance self-esteem
 - Listen and respond with empathy
 - Encourage involvement
 - Share thoughts, feelings, and rationale
 - Provide support without removing responsibility
- **BALANCE SEEKING AND TELLING:** Coaching is a balance of both seeking information and sharing information. The proper balance provides your staff with the benefit of your expertise and guidance along with involvement they need to “own” their development. This is an art and may take some practicing. Open-ended questions are a great way to seek more information if you find yourself “sharing” too much.

CONVERSATION PROCESS

Discovery

- **ENVIRONMENTAL SCAN**
 - Talk to your employee about the importance of employee development and its connection back to the organization’s goals (Balanced Scorecard, Brand Promises and Values).
 - Talk with your employee about how their role fits within the larger strategy of the organization and how the organization’s strategy may impact their role, your team or your department within the next one to five years.
 - Here are some questions to consider for this part of the conversation:
 - ▶ What are the long-term goals of your division?
 - ▶ What are the challenges and opportunities in your environment?
 - ▶ What are the current and future needs of the job someone is in right now?
 - ▶ Are there new developments that mean opportunity for growth in their job?
 - ▶ What future competencies/behaviors are needed that they can develop while in their current role?
- **SELF-AWARENESS**
 - Talk with your employee about their career aspirations, interests, passions, strengths, and growth areas.
 - Here are some questions to ask them for this part of the conversation:

- Strengths / Talents:
 - ▶ Of all of your skills and abilities, what is the biggest or best talent you bring to work?
 - ▶ What facets of your work do you really enjoy?
 - ▶ Which of your strengths would you like to continue to use and grow?
 - ▶ What work accomplishments show your career strengths in action?
- Aspirations:
 - ▶ What are your career aspirations? What does the next career choice look like?
 - ▶ Where can you make the greatest contribution?
 - ▶ How can you use your skills and interests to expand your contribution in your current job?
 - ▶ How can you use your skills, competencies and interests in other areas of the organization?
- Growth Areas:
 - ▶ Considering the environmental scan, what strengths would you like to enhance to achieve your career aspirations?
 - ▶ What competencies do you need to improve in order to achieve your career aspirations?

Action

1. Using the information gleaned from the Discovery section, have your employee narrow down their development areas and prioritize.
2. Conduct “current state” and “future/ desired state” exercise to determine areas of focus for professional growth.
3. Have the employee complete the Performance Development Plan (PDP).

Validation

1. Discuss the PDP with your employee. Keep in mind the key principles and to balance seeking and telling.
2. Use resources like the **70/20/10 Rule** (attached) to help ensure they build a balanced development plan.
3. Use resources like the **Career Choices** (attached) to gain clarity on career aspirations and alignment with development action steps.
4. Agree on any adjustments to the plan and have the employee update and send you a copy.
5. Post the PDP in Ultipro.
6. Continue the conversation around the PDP with quarterly Cme Check-In meetings to discuss progress (celebrate success!), and update and/or change any action steps.

SUMMARY

- Remember the key principles and balancing seeking and telling during development conversations.
- Resources about the **70/20/10 Rule** and **Career Choices** are attached.
- Development conversations are a critical piece in crafting a valuable PDP. PDPs are a key piece of the ongoing Cme Check-Ins.
- To go through this cycle (Discovery, Action and Validation) takes time and may take several conversations. Be patient. The time and energy you show to your employees around their development is highly connected to their overall engagement and morale. The return on investment is significant!

The 70-20-10 Rule

Ideally, 70 percent of action items on PDPs should be on-the-job training; 20 percent should focus on relationships; and 10 percent should involve participation in formal training.

Percentage of Action Items	Action Step Category	Action Step Ideas
70%	On-the-job experiences, tasks and problem solving	Action learning projects, such as fixing a process or troubleshooting an issue.
		Chair a special project
		Job rotation
		Taking charge in a crisis
		External role (volunteering, board membership, etc.)
		Sharing your wisdom by mentoring/teaching/coaching
20%	Relationships	Strong managers
		Mentors
		Strong role models
		Experts
		Wise person who recovered from a failure
10%	Formal training	First-time, high interest course
		Course where networking with peers is invaluable
		Content immediately needed and applicable
		Candid, constructive feedback experience; conclusions put into action
		Problem solving course; problem solving tools
		Increase in strategic understanding
		Follow-up and feedback immediately provided after training

Career Choices

What you want out of your career and what options are available to you can change throughout your work life. It is important to remember there are many ways to get moving toward your ideal career. Here are six ways to move toward your career goals.

Enrichment (Growing in Place)

This is a process in which you expand or change the responsibilities of your current job to acquire competencies relevant to your career goals. Although your title stays the same, some of your tasks and how you accomplish them change. The key to a successful enrichment experience is a discussion with your immediate supervisor to plan how your current position might evolve to incorporate tasks you would like to perform.

Exploration (Investigating Possibilities)

The goal of researching possibilities is to collect the information necessary to decide how best to build your career. Through exploration you can identify other jobs that require your skills, interests and values. This exploration can be done through short-term job assignments, temporary project participation or informational interviews.

Vertical (Moving Up)

Advancement is most likely to occur when individual abilities coincide with the organization's needs. Learn the direction in which your organization is going and seek out assignments that will prepare you for an upcoming opportunity.

Lateral (Moving Across)

This type of movement involves a change in job, but not necessarily in responsibility, status or pay. When organizations grow slowly or are cutting back, lateral movements are an important career option. Your current position may not offer dynamic projects that change with time, which can limit learning. A lateral move can provide you with an opportunity to expand your knowledge and skills base in a specific area or across different functional areas of the organization.

Realignment (Moving Down)

Realignment involves a downward move in the organization. Refocusing in this way allows you to stay with an organization you like while beginning a new career direction. People move down by choice for a variety of reasons. Realignment can be a strategy for reconciling the demands of your work with other priorities, such as a return to study, family or health commitments, or a career change. Sometimes less demanding work in a faster growing part of the organization can put you in line with new career opportunities. Seeking different work from what you are used to can provide you with a new set of responsibilities and challenges. Realignment can also be a training step.

Relocation (Moving On)

Relocation means you leave the organization. There will likely be a time in everyone's career when your current work just doesn't match your skills, interests or values. Relocation may be the best option for you if you have a career goal that is not realistic in your current organization, if changes in the external environment have made your technical expertise less valuable or unnecessary, or if you want to develop your entrepreneurial skills.