

Personal Development Template

Name

00.00.00

dba

Introduction

This template is an example of how an appraisal / performance review / personal development meeting could be run. There are many other forms this type of meeting could take. Please amend as you see fit.

It is designed to work as a free-flowing conversation that is led by the employee (with prompts from their manager).

It can be adapted in many ways to fit specific needs such as type of role (creative, client facing, new business development etc) – but should always link back to the objectives of the business and the core competencies that are valued.

- 1 — Step-by-step guide.**
- 2 — Employee: Preparing before the meeting.**
- 3 — In the meeting.**
- 4 — Employee: Previous year.**
- 5 — Employee: Next year.**
- 6 — Employee: Career development.**
- 7 — Manager: Additional comment and sign offs.**

Timings:

- To be done in preparation for the coming year year.
- Check in at half year on progress against objectives (approx. 6 months after the initial meeting).
- Note: feedback should be continuous/open as the year progresses. Any development issues shouldn't be saved up for the meetings.

Step-by-step guide

— Stage 1:

- Discussion on the core competencies of **[your business]** and targets for the year plus any other relevant information which may influence development plans.
- Manager is responsible for scheduling and leading this discussion with their team and direct reports.

— Stage 2:

- Both employee and manager to prepare in advance for the personal development meeting (Stage 3).
- Consider the competencies and targets when working through the prompt questions.
- Where relevant, the manager should consult with their own manager/others to gather additional feedback.

— Stage 3:

- Personal development meeting held between manager and employee.
- The onus will be on the employee to take ownership of their role and SMART objectives for the coming year. It is also a valuable opportunity for self reflection.
- The manager will also have opportunity to give additional feedback and set further objectives where they identify gaps.

— Stage 4:

- Meeting typed up and signed by both manager and employee. Keep copies.
- An additional meeting may be required before the template is finalised – this at the discretion of the manager and/or employee.
- Signed template to be scanned and sent to **[HR/Office Manager]** for filing.

Preparing for the meeting

Employee prompts

Use these questions to help focus your thoughts and reflect on your progress and your career:

- What would you like to **get out** of the conversation?
- What **one message** would you like the other person to take away from the conversation?
- How would you **rate** last year? Why?
- What were your **stand-out moments** of the year for you? Why?
- What didn't go so well? Why?
- What has **energised** you the most? Why?
- What are your **plans and goals** for this year? How do you plan to **achieve** them?
- What will make the year ahead **a success** for you?
- If you could **change one thing**, what would it be? Why would it make a **difference**?
- What else would you like an **opportunity** to be involved with? Why?
- How do you see your **career developing**? What help do you need to progress?

In the meeting

Come ready to...

- Listen
- Trust
- Remain open
- Encourage
- Ask questions
- Challenge
- Seek feedback
- Reflect

...and let the discussion flow...

Summary: Previous year Employee

Employee to take notes in the meeting and fill in here afterwards

Topics to cover

- How was last year?
- Stand out moments?
- Low moments?
- What did you learn?

Summary: Next year Employee

Employee to take notes in the meeting and fill in here afterwards

Topics to cover

- Plans and goals?
- How will you achieve them?
- Think SMART!

Summary: Career development

Employee

Employee to take notes in the meeting and fill in here afterwards

Topics to cover

— How would you like your career to develop or progress?

Summary: Manager's comments

Manager: *Name*

Manager to take notes in the meeting and fill in here afterwards

Things to cover

— What else would you add to help the employee progress?

Conversation date:

Employee name and signature:

Manager name and signature: