IDP Self-Assessment Form

This form will help you prepare for your IDP conversation with your manager. Use it to generate general thoughts that you can, in turn, formulate into specific goals and actions.

Professional Goals

Where are you on your current career path? Is it where you want to be?

Consider the following:

- Are you a recent employee? Is your role within your organization new? Do you need to acquire new or additional skills to be competent in your role?
- Are you contemplating transitioning into a different role? Will you need to acquire a new skills set or continue to develop existing skills?
- Are you an experienced worker seeking additional challenges, developing existing talents to meet changing work requirements, or mentoring fellow employees within your organization?

THESE QUESTIONS WILL HELP YOU FURTHER REFINE YOUR PROFESSIONAL GOALS.

1. What do I find most rewarding, most satisfying?

2. What is most important to me, in my work and private life?

3. Is my work life lacking somehow? What do I want to be doing right now that I am not doing at present?

4. How will my goals help me be a more effective employee to my organization?

5. What does my organization require most of me? Am I able to provide this?

6. Am I content where I currently am, or do I see myself in a different role in the future? What is this new role?

7. Is my current role likely to change, and will I be able to change with it?

8. What do I need to continue to develop professionally and remain dynamic in my role?

9. Do my professional goals fit my organization’s needs, and if so, where?
Strengths and Development Opportunities

It is time to consider your strengths and development opportunities as they apply to as many of the below categories as possible. Record your immediate thoughts; do not try to overthink your answers. You will hone your responses later on in the process. The important thing is to get your initial responses down on paper.

TECHNICAL KNOWLEDGE/EXPERTISE SKILL - Such as: project management, consulting, computer applications, etc.

Strength:

Development Opportunity:

PERSONAL SKILL - Such as: trouble shooting, time management, communicating well, etc.

Strength:

Development Opportunity:

INTERPERSONAL SKILL - Such as: supporting others' efforts, listening, collaborating, etc.

Strength:

Development Opportunity:

MANAGEMENT AND LEADERSHIP SKILLS - Such as: coaching, delegating, strategic planning, motivating others, etc.

Strength:

Development Opportunity:
Passions

Often, we don’t consider our passions, what really excites us, what causes us to “loose track of time.” But identifying your passions is important. They motivate us, are our strengths, and keep us engaged in our work.

IDENTIFY YOUR PASSIONS BY CHECKING THE BELOW STATEMENTS THAT APPLY TO YOU. THESE PASSIONS WILL BE ACCOUNTED FOR IN YOUR IDP.

CONTRIBUTING EXPERTISE

- Providing others input based on my expertise
- Using my expertise to produce work
- Contributing to a team effort
- Solving technical problems
- Teaching others skills within my area of expertise
- Resolving issues with customers
- Other

CONTRIBUTING TO GETTING WORK COMPLETED

- Facilitating team work efforts
- Creating practices that support organizational objectives and goals
- Monitoring metrics to ensure quality and/or noting areas of improvement
- Establishing problem solving and decision making procedures
- Developing project plans and project status updates
- Other

SUPPORTING PEOPLE

- Communicating goals
- Acknowledging others’ efforts
- Providing timely feedback
- Assigning tasks which will develop others
- Helping others resolve conflict
- Other

DEVELOPING ORGANIZATION ENVIRONMENT

- Adapting organization’s goals to my own department’s goals
- Establishing work priorities through strategic discussion with staff
- Envisioning my future role in the organization
- Assessing trends as they pertain to my organization
- Communicating change and organizational goals to my staff
- Considering greater ramifications of organization’s decisions
- Other
ALIGNMENT - YOUR PROFESSIONAL GOALS AND THE ORGANIZATION’S GOALS

Now that you’ve considered what you have to offer professionally, at present and in the future, think about how this applies to your current role and your future professional goals. It’s important to consider how your organization is growing and developing so you can tap into this growth and its ensuing opportunities, now and in the future.

ANSWER THE QUESTIONS BELOW TO FOCUS YOUR THINKING.

What do I need to do, or what skills do I need to possess, to perform at the highest level at my current job?

Where is my organization going, and what do I need to do to keep pace?

What future positions pique my interest?

What skills and capabilities will I need to perform these future roles?

TIME TO PLAN!

Look over the information you have compiled on these pages. Identify two or three areas on which you’d like this year’s IDP to focus. Fill out the IDP form to prepare for your meeting with your manager.