Creating Individual Development Plans and Assessing Progress Against Them

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I. INTRODUCTION

About This Research

Individual development plans (IDPs) serve as powerful tools not only for developing your employees, but also for demonstrating that you are committed to their development. IDPs benefit employees by providing developmental road maps to follow for acquiring skills needed in current and best roles; for managers, IDPs often serve as the foundation of efforts to develop employee skills that are critical to team performance.

IDPs are living documents that can change during the course of their implementation. Good IDPs share some common characteristics: 1) they are created after both the employee and manager assess carefully the employee’s strengths and weaknesses; 2) they leverage an employee’s strengths and focus on improving one or two weaknesses; 3) they contain a plan for an employee to meet development goals with assistance from his or her manager; 4) they explain the standards on which the achievement of these goals will be measured; and 5) they provide a timetable for revisiting and reassessing these goals.

Perhaps most importantly, the success or failure of an IDP often hinges on the relationships you share with your employees. In other words, the messenger matters as much as the message.

This guide is intended to provide you with tips to create and implement an IDP and to assess an employee’s progress against the goals they set out to achieve.

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II. CREATING THE PLAN

Point 1: Establish Healthy Employee Relationships

The success or failure of IDPs hinges less on the contents of the plan as it does on the type of relationship that you maintain with your direct reports. If you are viewed as inconsistent or unfair, or if an employee is dissatisfied with you as a manager, your assessment of an employee’s performance, regardless of quality or intent, will likely have little impact. It is therefore imperative that you establish healthy relationships with your direct reports. For more tips on how to accomplish this, please see the guide entitled *Establishing Healthy Employee Relationships*; to learn tips for providing effective feedback, please see the guide entitled *Improving the Performance Review Process*.

Point 2: Create an IDP

An IDP is, for the most part, exactly what its name implies: a plan for development unique to a particular employee. There are three important guidelines to remember in the creation of an IDP:

- **Incorporate** employee input. There are two important components to a development plan’s success: employee input and employee buy-in. Employees typically know their career aspirations, the areas in which they perform strongly, and the areas that require improvement. Managers learn these aspects after observing, assessing, and discussing with the employee his or her performance. Creating an IDP without employee input can hamper employee buy-in and decrease the chances of the plan improving performance.
- **Leverage** employee strengths while mitigating or improving one or two areas where the employee may not be as strong. Managers may select these areas of focus after assessing the needs of the team or the organization and aligning employee-development goals with those needs.
- **IDPs** often focus on the skills and knowledge employees need to fulfill their current jobs as well as those they will need to perform at the next level. Finally, goals must be achievable: expecting employee performance to turn 180 degrees is not only unreasonable, but it can discourage the employee. Creating a plan for incremental improvement, on the other hand, makes goals attainable and increases the likelihood of employee buy-in.
- **Create** a plan for meeting goals. That said, IDPs should not consist only of a “laundry list” of training courses. These plans should include a mix of development opportunities: specific training courses, on-the-job experiences, stretch roles, and potential mentoring relationships. The plan requires that the manager assist the employee in meeting his or her goals that the employee fulfills an agreed-on timetable for completing these development opportunities, and that the employee understands the standards for measuring results.
II. CREATING THE PLAN (CONTINUED)

Point 3: Ensure Your Employees Have the Necessary Skills/Knowledge for Future Roles

Obviously, managers can improve the performance of their employees by ensuring they have the necessary skills and knowledge to perform their current jobs well and by differentiating between which skills are “nice to have” and which are “need to have.” However, by providing the opportunities to develop the skills your employees will need as they move along in their careers within your organization, you are not only increasing the skill set of your team as a whole but also demonstrating that you are committed to employee development. Part of an IDP’s construction requires identifying these skills by engaging in frank discussions with employees on their career ambitions and then assessing current areas of strength and opportunities for improvement. It further requires periodic assessment of how the skills and knowledge needed to optimally perform a particular job evolve as the organization changes.

Point 4: Help Your Employees Find the Training They Need

Don’t assume that employees can find the development opportunities that they need. Part of the manager’s role in the development process is to help identify training options to assist employees in meeting their development goals. While part of this process takes place during the construction of the IDP, some of it also occurs across the IDP’s life cycle. Providing employees with information regarding formal courses as well as identifying other opportunities for development—such as stretch roles, on-the-job development, and mentoring programs—helps employees move quickly from “development planning” to “development action.”
III. IMPLEMENTING THE IDP

Point 1: Provide Experiences That Develop Employees

Beyond helping employees find relevant training courses, managers can assist their employees in meeting their development goals by providing them with work experiences that provide development opportunities within and outside of their jobs. Among these are on-the-job experiences. Employees can improve their skills or leverage their strengths as they learn on projects or tasks that are part of day-to-day work. Assigning projects that encourage development of target skill areas can aid employees significantly in the attainment of their development goals. In essence, you should partner with your employees to "mine" their jobs for projects/activities that will facilitate their development. For example, an employee who is struggling with project management may benefit from managing an aspect of a team project on his or her own.

In addition, you can either pass along existing or create new opportunities for your employees to develop through the use of stretch roles. These stretch roles can further develop an aspect of a skill or strength that an employee may not have otherwise.

Point 2: Pass Along Relevant Development Opportunities

During the life cycle of an IDP, opportunities may emerge for employees to gain experience in roles beyond their delineated job responsibilities. These "stretch roles" provide opportunities to further develop skills or strengths that employees may not otherwise be able to access. The emphasis when passing along development opportunities is on "acceptable risk": providing a development opportunity that does not "stretch" an employee does not help him or her attain development goals, while providing an opportunity that places the employee out of his or her depth creates unacceptable risks for the employee and the organization.

To Think About—Examples of Developmental Opportunities

Examples of these types of experiences include the following:

- Filling in for a manager on vacation
- Mentoring or onboarding a new employee
- Representing the team at a cross-functional meeting
- Managing a particular project from start to finish
- Making a temporary lateral move to another part of the organization
- Helping launch a new business, initiative, or program
- Helping turn around a struggling business
- Presenting the team's work during a meeting
- Serving as a liaison between two or more functions
- Working on a challenging project or initiative
- Developing a new product or service
- Interviewing potential employees
- Teaching a process or course to the team or others
III. IMPLEMENTING THE IDP (CONTINUED)

Point 3: Pass Along Relevant Job Openings

As noted in the introduction, an IDP not only focuses on skills necessary to succeed in an employee’s current job, it also focuses on building a skill set that will help an employee succeed at the next level of his or her career path. By passing along relevant job openings that link to career aspirations within the organization, managers send a message—not just to the employee informed of the opening, but to the rest of the team as well—that they care about the long-term development and careers of their employees and the success of the organization as a whole.

To Remember

- Passing along job openings to qualified members of your team sends the message that you are committed to long-term employee development.
IV. ASSESSING THE DEVELOPMENT PLAN

Point 1: Assess Your Employee’s Development Progress

An IDP should include a timetable for the employee to engage in training to achieve goals and for the employee and manager to meet and discuss the employee’s progress against the plan.

While some managers revisit the IDP during the formal review process, more frequent meetings may be appropriate, particularly if an employee appears to be struggling to achieve the goals set forth in the IDP.

Regardless of when you deliver feedback or the type of feedback you deliver, it is important to remember that an IDP is a living document. Employees rarely perfect their skills in the time between performance reviews. It is important to amend the IDP when changes occur in an individual’s responsibilities or goals, when the organization’s or team’s goals change, or when parts of the plan, such as the types of training solutions recommended, are no longer options.

Research Methodology

The information presented in this guide is based on a thorough review of professional and academic literature. Given the diversity of perspectives on these topics, this guide is designed to summarize for managers the existing research available on this topic, rather than to impart a particular point of view accepted by the Roundtable.

To Remember

- IDPs are living documents: they change as employees’ skills change or as organizational goals shift.
- As such, IDPs should be revisited and amended regularly.