TALENT AND LEADERSHIP

ASSESSMENT HIGHLIGHTS

sms
Scrap Metal Services LLC

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TALENT AND LEADERSHIP ASSESSMNT HIGHLIGHTS

The SMS Leadership Team has engaged in a Talent and Leadership Assessment that kicked off March 5, 2018 in Burnham with a review of Leadership, Commercial North, Mill Services, and Sales and concluded with a review of Commercial South in Brownsville on March 12, 2018. 63 employees were reviewed by their individual manager and then calibrated with a representative peer group, including SMS leadership. The primary tool utilized for this review is a 9-Box performance/potential matrix. Prior to each session the review team received a basic introduction to the tools and definitions to be used during the calibration session including a discussion of core leadership competencies and performance ratings.

DEVELOPING HIGH POTENTIAL/SME

Individual is performing well in his/her current job but needs to continue development in current role, or may have valuable technical skills but has not exhibited leadership potential. Individual has not demonstrated willingness to take on significantly greater scope and responsibility in the next 12 months.

AGILE HIGH PERFORMER

Individual performs well in his/her current job, makes valuable contributions and consistently demonstrates competencies required. May be ready to take on greater scope and responsibility in the next 12 months.

CONSISTENT STAR

Individual is developing faster than the demands of his/her current position and/or division. Individual is ready to broaden his/her skill set and take on significantly greater scope and responsibility.

SOLID PROFESSIONAL

Individual is currently meeting the expectations of his/her role. Individual is not prepared to absorb additional scope or complexity in the next 12-24 months.

KEY PERFORMER

Individual is currently meeting expectations but may not be willing or able to advance; may not be ready to absorb additional scope or complexity in the next 12-24 months.

RISING STAR

Individual is contributing as expected and is meeting performance expectations. Individual may be ready to take on greater technical and/or leadership responsibility in the next 12-24 months.

SEPARATION RISK

Individual is not meeting performance expectations and there is still more to learn in the current position. There are questions about his/her ability to succeed in the current role long term.

INCONSISTENT PERFORMER

Individual has not been the position long enough to adequately demonstrate his/her technical abilities, or may have lost pace with changes in the organization

HIDDEN GEM

Individual is not meeting the requirements in his/her current role. Individual could be more successful in the current role with more direction or in another role or division that more appropriately suits his/her skill set.

LEADERSHIP

	Needs Development	Meets Expectations	Exceeds Expectations
Exceeds		Felipe Gustavo	
Meets	Jeff Lacy	Jerry Corcoran	Bryan Wilt, Shannon Jordan, Tim O' Connor, Thad Smith, Thad Smith
Improve	Roy Corrigan, Craig Thornton, Courtland Acosta	Edgar Favela, Dan Gertler, Nick Schlip	
	Limited	Moderate	High

PERFORMANCE OVER TIME

LEADERSHIP POTENTIAL

What is Lorem Ipsum?

Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum.

COMMERCIAL NORTH

PERFORMANCE OVER TIME

LEADERSHIP POTENTIAL

	Needs Development	Meets Expectations	Exceeds Expectations
Exceeds		Cody Carrington	Bobby Thompson
Meets	Cindy Levine Brice Wolf Doug Bushnell Alexia Hamilton	Rudy Monterrubio Randy Schlip Martine Favela Temo Garcia	Victor Landeros Bobby Heath
Improve			Jose Monterrubio Greg Graves Eddie Venegas
	Limited	Moderate	High

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COMMERCIAL SOUTH

	Needs Development	Meets Expectations	Exceeds Expectations
Exceeds		Yulissa Perfecto Pedro Martinez	Bobby Thompson
Meets	Dan Lopez Andy Presto	Ivis Hernandez	Estefani Diaz Alexis Meuller
Improve	Cesar Espino	Miguel Garcia Marcus Jackson	

Limited — Moderate — High

PERFORMANCE OVER TIME

LEADERSHIP POTENTIAL

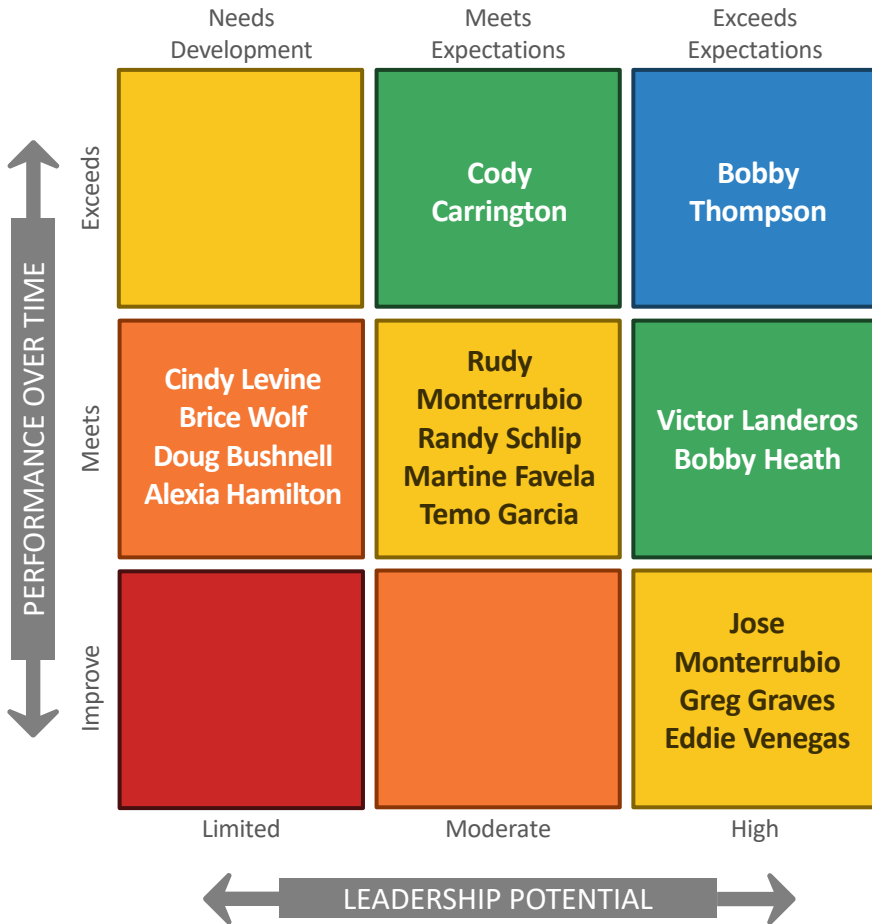## What is Lorem Ipsum?

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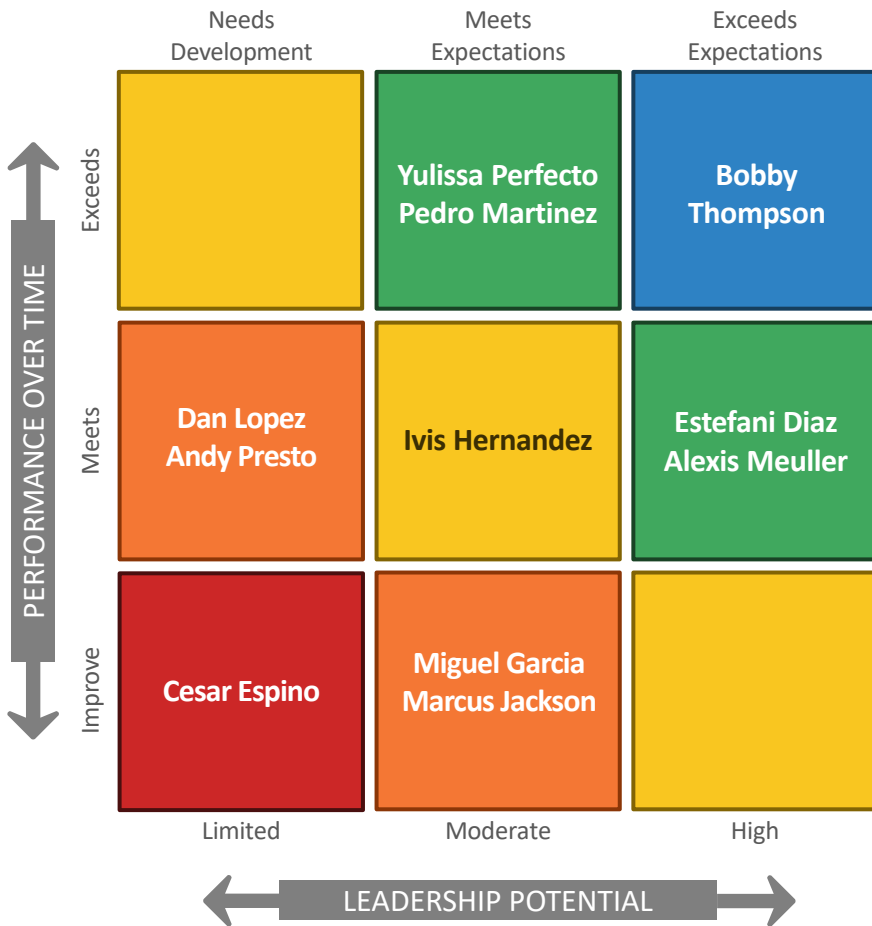
MILL SERVICES

PERFORMANCE OVER TIME

	Needs Development	Meets Expectations	Exceeds Expectations
Exceeds	Greg Heintzman Dave Weeks Randy Smith	Maura Myers Dave Palmer	
Meets	Rodney Sykes Casey Smith, Jim Pease, William Ball, Tom Young, Danielle Rembor	Ray Shelton Jamie Hughes	Dineen Bildstein
Improve	Eric Grabus	Adam Furlong Vicki Ciena	Andrew Sanford
	Limited	Moderate	High

LEADERSHIP POTENTIAL

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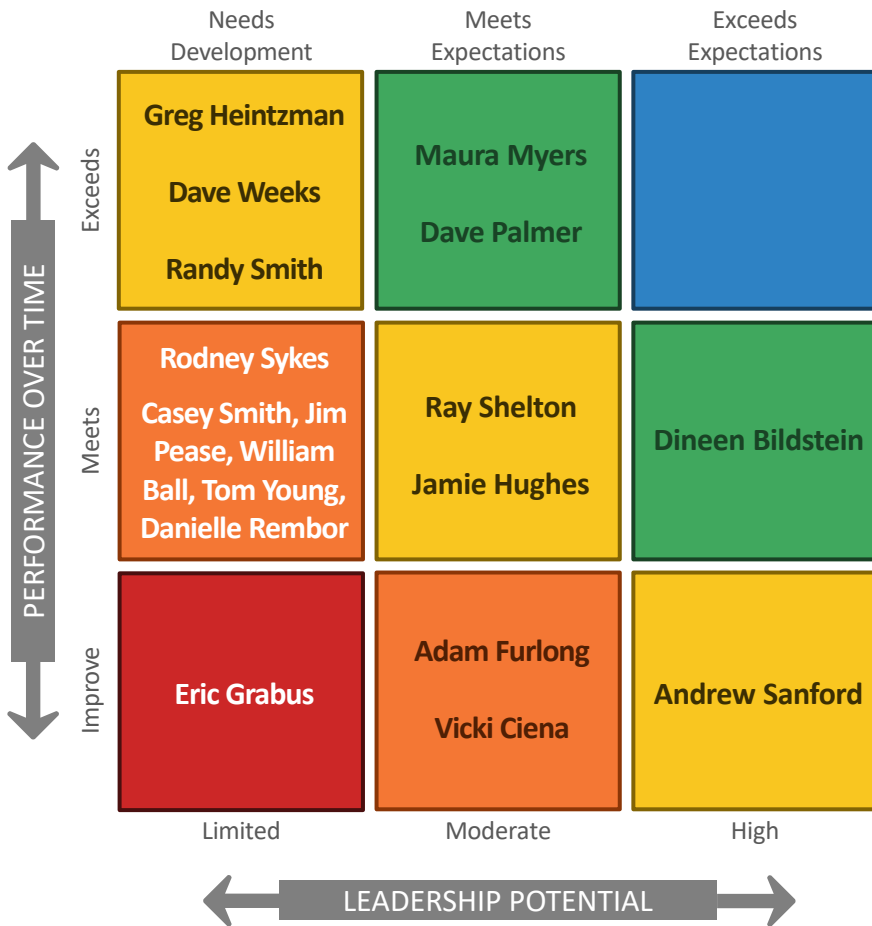
SALES

PERFORMANCE OVER TIME

	Needs Development	Meets Expectations	Exceeds Expectations
Exceeds		Chris Yuris	
Meets	Dayle Dodson	Stacy Hauptstueck Scott Moerman	
Improve		Ken Rutowski Jose Fernandez	Jason Gertler
	Limited	Moderate	High

LEADERSHIP POTENTIAL

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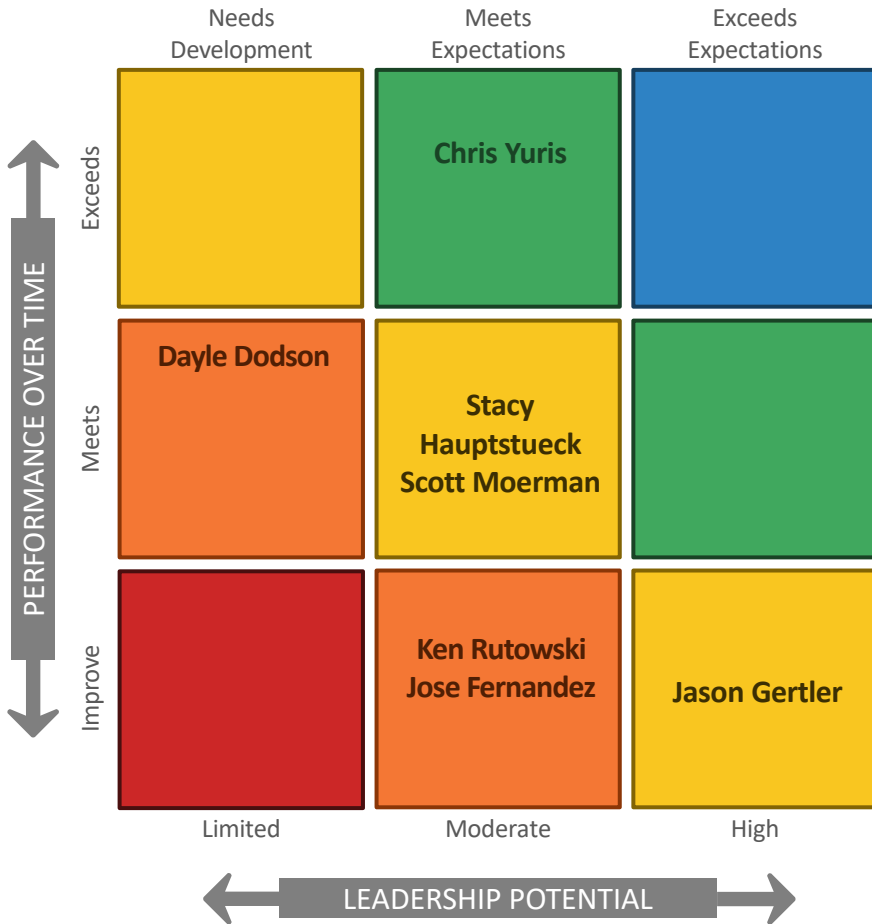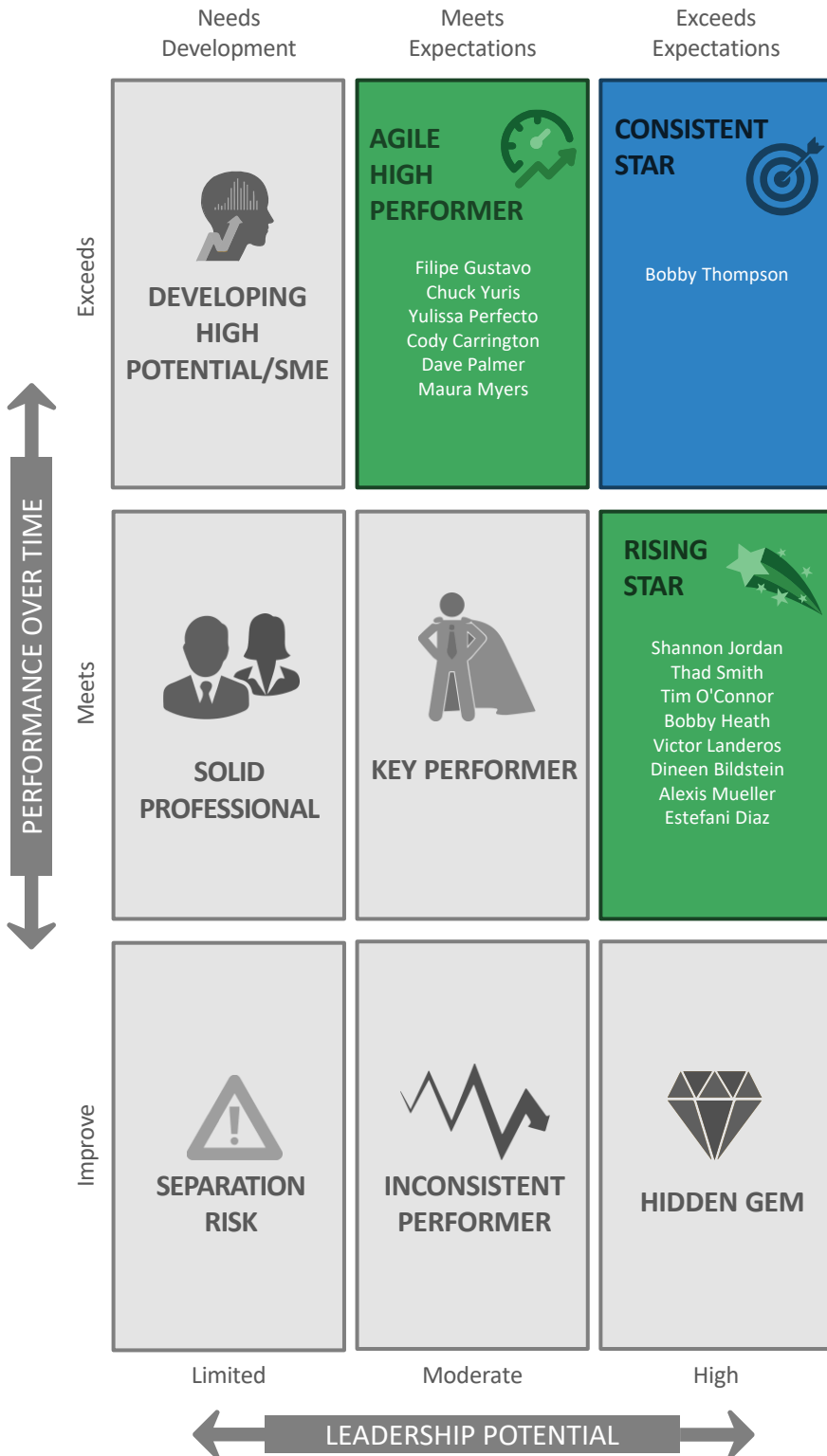
ENTERPRISE OVERVIEW BY PERFORMANCE/POTENTIAL MATRIX

	Needs Development	Meets Expectations	Exceeds Expectations
Exceeds	**DEVELOPING HIGH POTENTIAL/SME**	**AGILE HIGH PERFORMER** Filipe Gustavo Chuck Yuris Yulissa Perfecto Cody Carrington Dave Palmer Maura Myers	**CONSISTENT STAR** Bobby Thompson
Meets	**SOLID PROFESSIONAL**	**KEY PERFORMER**	**RISING STAR** Shannon Jordan Thad Smith Tim O'Connor Bobby Heath Victor Landeros Dineen Bildstein Alexis Mueller Estefani Diaz
Improve	**SEPARATION RISK**	**INCONSISTENT PERFORMER**	**HIDDEN GEM**
	Limited	Moderate	High

PERFORMANCE OVER TIME

LEADERSHIP POTENTIAL

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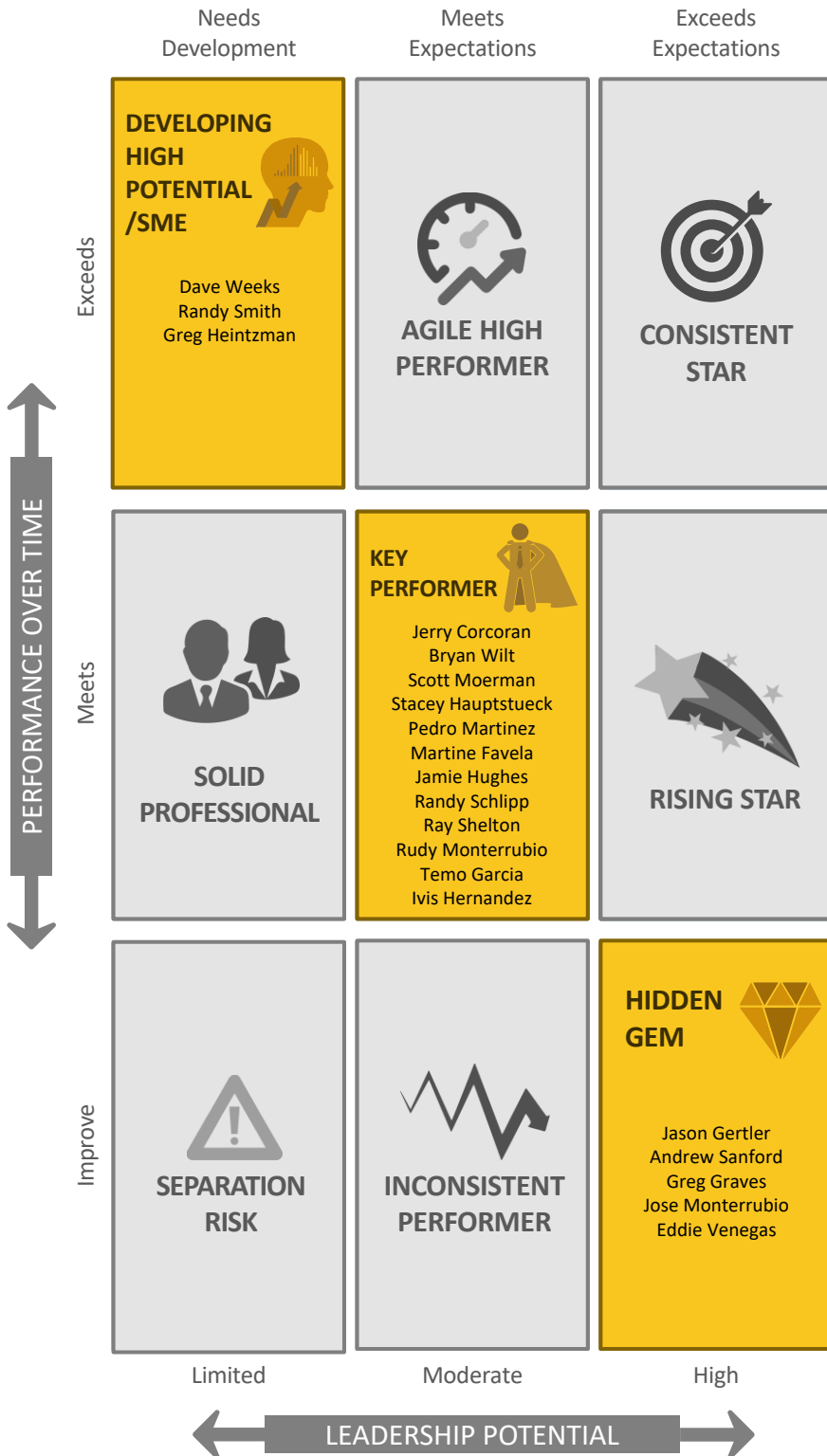
ENTERPRISE OVERVIEW BY PERFORMANCE/POTENTIAL MATRIX

	Needs Development	Meets Expectations	Exceeds Expectations
Exceeds	**DEVELOPING HIGH POTENTIAL /SME** Dave Weeks Randy Smith Greg Heintzman	**AGILE HIGH PERFORMER**	**CONSISTENT STAR**
Meets	**SOLID PROFESSIONAL**	**KEY PERFORMER** Jerry Corcoran Bryan Wilt Scott Moerman Stacey Hauptstueck Pedro Martinez Martine Favela Jamie Hughes Randy Schlipp Ray Shelton Rudy Monterrubio Temo Garcia Ivis Hernandez	**RISING STAR**
Improve	**SEPARATION RISK**	**INCONSISTENT PERFORMER**	**HIDDEN GEM** Jason Gertler Andrew Sanford Greg Graves Jose Monterrubio Eddie Venegas
	Limited	Moderate	High

PERFORMANCE OVER TIME

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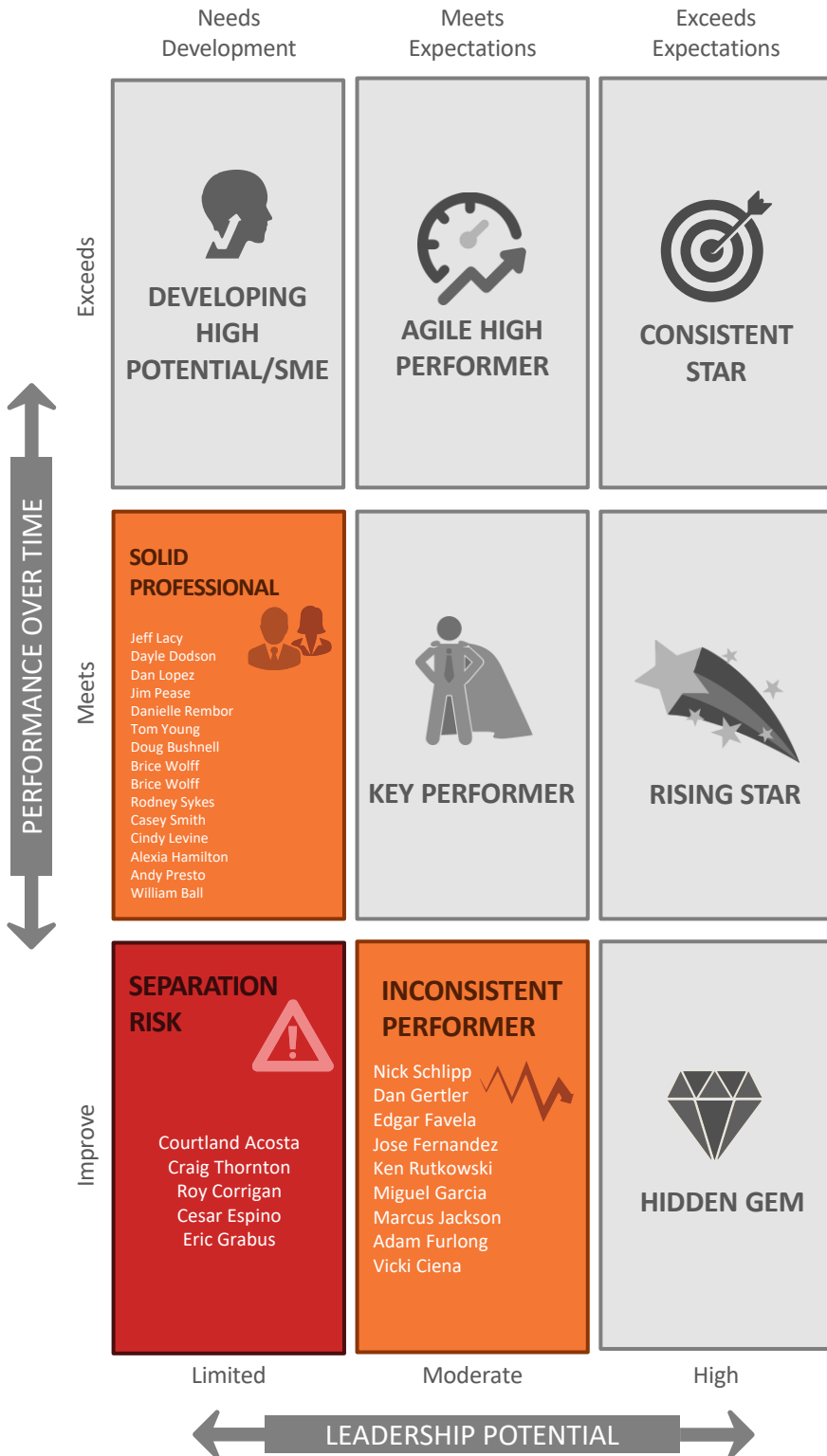
ENTERPRISE OVERVIEW BY PERFORMANCE/POTENTIAL MATRIX

PERFORMANCE OVER TIME

	Needs Development	Meets Expectations	Exceeds Expectations
Exceeds	**DEVELOPING HIGH POTENTIAL/SME**	**AGILE HIGH PERFORMER**	**CONSISTENT STAR**
Meets	**SOLID PROFESSIONAL** Jeff Lacy Dayle Dodson Dan Lopez Jim Pease Danielle Rembor Tom Young Doug Bushnell Brice Wolff Brice Wolff Rodney Sykes Casey Smith Cindy Levine Alexia Hamilton Andy Presto William Ball	**KEY PERFORMER**	**RISING STAR**
Improve	**SEPARATION RISK** Courtland Acosta Craig Thornton Roy Corrigan Cesar Espino Eric Grabus	**INCONSISTENT PERFORMER** Nick Schlipp Dan Gertler Edgar Favela Jose Fernandez Ken Rutkowski Miguel Garcia Marcus Jackson Adam Furlong Vicki Ciena	**HIDDEN GEM**
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STRATEGIC CONSIDERATIONS AND NEXT STEP RECOMMENDATIONS

Competency Model

Rationale- Formally or informally adopting a competency framework provides a common link between hiring, on boarding, development, and performance management. More specifically a competency framework can drive progress in-

Identifying skills gaps
with an emphasis on competencies SMS can more clearly define the skills that are required for each role as well as track and identify the skills gaps within the workforce.

Better Hires
Understanding exactly what competencies are needed for a position, the recruiting and hiring process becomes more efficient and you are better able to establish what success "looks like" from the outset. For example- if you hire someone for a role with the understanding they need development in "Driving Results" you can put a development plan in place to support your new hire in their role.

Alignment
a workforce aligned to the SMS strategy, goals, and objectives is essential for success. Regular assessment, tracking and measuring competencies can allow SMS to be make intentional decisions about its talent.

Management Effectiveness
understanding the competencies required for success at SMS will improve leadership's ability to have a consistent enterprise view of talent, create efficient teams, and match employees with those that complement each other's core competencies, as well as intervene when skills gaps are perceived.

Succession and Promotion Planning
SMS faces some key departures over the next 2-5 years. (e.g., QC). It is possible for positions to be filled by existing internal top talent. By making use of a competency model, leadership can begin to phase out those who plan to exit and groom existing employees to step in and be successful.

Accelerating Organizational Performance
Organizations that have competency management initiatives in place exceed those that don't in revenue per employee, customer satisfaction and efficiency

Considerations
There are numerous competency models in the market place such as the Korn Ferry Leader Architect model. Selecting a model typically involves purchasing a license that allows SMS to use (publish in job descriptions, handbooks, use in training and development) the competency language and tools freely.

Navigating People Management at SMS

Note: a vast body of data exists around training and development including the 70-20-10 model- 70% of learning comes on the job, 20% from peers, and 10% from formal training. Any training/development recommendations could be delivered in-house, using internal staff (train the trainer), consist of cross functional cohorts, and have an identified learning project. Utilizing a design perspective (start with the end in mind) is typically most effective in creating a customized offering.

Rationale- Developing an in-house, SMS specific development program for all people leaders provides a consistent enterprise approach and provides people leaders with the foundational knowledge, skills, and abilities to be successful.

Considerations

Pilot a development offering with a goal of creating a small cohort of advocates that can be effective in delivering the program

Have an enterprise approach- local modules added as needed

Measure results by constructing simple surveys for-

Level one assessment – did the participants get value?

Level two assessment- is the development making a difference?

Sample Modules

- SMS Values Reinforcement
- Operational Responsibilities- budget, procurement, time keeping, etc.
- People Responsibilities- developing others, challenging conversations, how to coach your employees, labor considerations, managing performance, managing change.
- Local module- specific content related to a site or program- but needs to complement the enterprise approach. Localized "one-off" efforts should be coordinated for consistency and alignment to SMS strategy.

Leading the SMS Way – Leadership Development Program

Rationale- building on the people management offering, having a program for your identified high potentials is effective, not only for purposes of retention, but can have an "ripple effect" across the enterprise providing a cohesive framework for SMS leadership.

The program is by invitation only- decisions made by SMS Executive Team based on the current talent assessment and accepting nominations from managers. The goal is to create an environment where people want to attend.

Cohort based and if nominated, graduation from the program is a performance expectation.

Sample Modules

- 360/multi rater assessment for each participant including an individual coaching session and de-brief to craft an individual development strategy.
- The Executive Team should select a project for each cohort. The project should be work SMS needs to accomplish- not something "made up".
- Each cohort should have access to team and/or individual performance coaching.
- 3-4 sessions removed from daily work for the learning components, e.g., Leadership at SMS, Understanding the Strategy, Leading vs Managing, the Global context, and leading change. Anticipate 1.5 - 2 days for each identified module.
- The team project is briefed to the Executive Team as a component of program completion.

Leadership Development – 360/multi rater assessment

Rationale- understanding, from multiple points of view, an individual's performance and potential can be a powerful motivator for improved performance.

Considerations

The 360 is a component of the Leadership Development Program, but could also be used as an individual development activity on a selective basis.

Use cautiously as a stand-alone activity. Should be tied to a metric of performance and competency based improvement.

Korn-Ferry "Voices 360" is a good tool that is linked to the KF competency architecture. The Global Leadership 360 (Marshall Goldsmith Stakeholder Centered Coaching) is also a good model.

Talent Acquisition Pipeline Development (Recruiting)

Rationale- aggressively building and maintaining a pipeline of candidates for SMS is a key component to succession planning. Striking the balance between new talent and developing existing talent is a key organizational decision. Developing a robust recruitment strategy that moves away from "post and pray" to creating a much more proactive environment is a critical. The life blood of SMS success is in hiring the right people and putting them in the right role.

Considerations

Posting a job opening on your web site is the bare minimum and only works to the extent people understand SMS as an employer. Establish a "talent community" on your site- where people can submit their qualifications even if there is no job opening.

Partnering with business development/sales/marketing can be effective in creating an awareness in the market of SMS as an employer of choice- the means positioning SMS as more than a scrap yard.

Building a presence in the community by visibly participating in community-building activities, e.g., habitat for humanity, charity drives, sponsoring athletic events, or offering a "day of service" for employees. All of these community based activities build partnerships and can have long term pay off that extend beyond recruiting.

Talent Acquisition Strategy

Rationale- understanding, from multiple points of view, an individual's performance and potential can be a powerful motivator for improved performance.

Considerations

External Job Board Posting sites:
all job boards are not created equal. Job boards can be specific by industry or discipline, or general in nature. Job board effectiveness and popularity may also vary by geographic location. Connect with your leader and HR for more information.

Apprenticeship Programs
by 2020 it is estimated that 40% of all new positions will be in the "middle skills" category- jobs that require more than a high school diploma, but less than a four-year degree. In the long term SMS may struggle to "buy" the skills necessary in the market. Partnering with local organizations, particularly community colleges to create apprenticeship programs that combine class room learning with on the job training and development can provide long term benefits for SMS in securing talent.

Local Community Colleges, University Relations and Intern program/Education Partnerships:
offer us a rich ground to recruit from. Candidates from this channel may already be familiar with our industry, company and culture. University programs can be an effective source for your entry level manager positions.

Print Advertising
Depending on the role and geographic location of our offices, they may rely heavily on print advertising, whether in local newspapers or industry magazines. Leverage this source to capture the attention of the workforce that relies on public transportation to and from work.

Career Fairs and Recruiting Events:
are rich in candidates that are actively looking for employment. Be prepared to offer contingent hiring on the spot and promote this feature to set you apart from other organizations.

Hosting an "open house":
can be an effective means of attracting, interviewing, and hiring talent on the spot. This forum is often ideal for seasonal hiring such as interns, summer employment or when you have multiple positions open at the same time in one location or near locations.
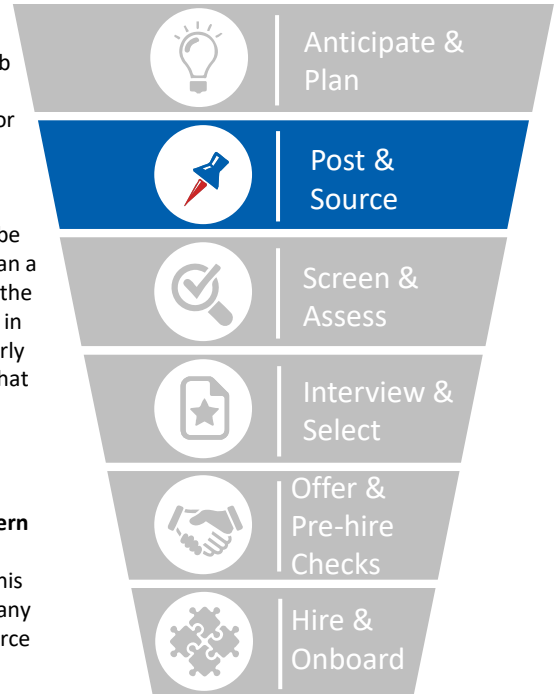
Professional Associations
are a good source for targeted recruiting. Associations often email their members with job openings, industry news, and events. Professional Associations also publish a list of their members, with contact information, which makes for a great resource for your recruiters to "direct recruit".

Local Government Agencies:
drive candidates to employers. They may also pre-screen or prepare job seekers for their job search before they apply. Making your jobs available to these local agencies is not only the right thing to do, but will result in talent that is committed to working for SMS and prepared to go through the process.

Anticipate & Plan

Post & Source

Screen & Assess

Interview & Select

Offer & Pre-hire Checks

Hire & Onboard

Talent Acquisition Strategy

Considerations

Search Firms:
are an effective source for filling hard to fill positions, identifying very specific skill sets, and for filling unique roles. Search firm usage should be reserved for only those hard to fill management level positions.

Employee Referral Programs:
this is one of the most effective sources for filling OPEN positions.

Relationship Recruiting:
Relationship recruiting is the act of developing a pipeline of talent for FUTURE openings. It is performed PRIOR to having an opening and the desired results are the identification of external talent through networking, cultivating relationships with people of interest, and championing SMS to that talent and that talent to SMS. Through relationship recruiting, you generate a pipeline of prospects for future job opportunities. When leveraging relationship recruiting as a sourcing channel, you are reaching out to those individuals that you have already identified as solid prospects for a particular discipline or position.

Social Media Recruiting:
includes both pro-active and reactive recruiting. Developing a very strong Social Media presence designed to continuously drive potential talent to our job openings. Pro-active social media recruiting occurs when the recruiter, engages with potential talent via a social media channel such as LinkedIn. SMS should begin crafting a social media strategy focusing first on Facebook (over 1 billion people active per day) and migrating to LinkedIn.

Organizational Structure

Rationale- taking a look across the enterprise and making reasoned decisions regarding the organizational structure may prove a worthwhile exercise. When looking at the structure you can begin to make decisions about span of control (how many direct reports per people manager), centralized vs decentralized functions, e.g., does Commercial South need inside sales support, or should all sales functions be under one central location.

Considerations

- There is the "picture" of your organizations, the organizational structure, and there are how things get done. Focus on making sure you understand the "how things get done" then devise your structure according to how you want to move the company forward.

- There are no right or wrong answers but understanding the landscape from the organizational design standpoint ensures you are making strategic decisions calculated to achieve your objectives.

On-Boarding

Rationale- an effective and multi-stage on boarding process helps cement an early sense of belonging and provides an excellent opportunity to get your employee started with a broad understanding of the SMS culture and ways of doing business, and minimizes time to productivity.

Considerations

On-boarding is more than a singular event
periodic and timely communication to employees following their new employee experience is vital to success. For example, a communication about payroll when the time to submit the first time sheet nears, a reminder of required safety or IT training. There reminders serve to continue to connect the new employee to SMS.

Segment the Offering
a corporate offering for all new employees is focused on culture, history, and what it means to be a SMS employee, connecting the employee to the enterprise structure. Presence by a senior leader should be a consideration.

Local On Boarding
site specific. Understanding, within the corporate context, the uniqueness of each site.

Team On Boarding
the individual's supervisor orients each employee to the team. Again, in the context of the enterprise, but a very local, day-to-day orientation.

Mergers and Acquisitions

Rationale- the operational aspect of M&A is readily apparent, due diligence, operational, and financial reviews, valuation, etc. An equal level of attention paid to the people component can improve transitions and integrations of the organizational cultures.

Considerations

Create a M&A academy/workshop/training
for all involved to ensure everyone has a common frame of reference for the opportunity. How is M&A done the "SMS Way"?

Pay attention to the "soft side"- culture, norms, expectation, how people will work together.
Having a well versed HR person to manage the people due diligence (compensation structure, compliance, etc) and someone to help leaders navigate manage the change for all employees and lead the effort to integrate the change can improve your outcome and enable SMS to continue to build upon and learn from its M&A strategy.

Social Media Strategy

Rationale- leveraging social media in the recruiting space obviously requires a presence. With over 1 billion users daily Facebook can be a key SMS branding channel for messaging about SMS, your presence in the community, your activities, and your jobs. LinkedIn has over 3.4million users who have activated the "open candidate" feature, letting recruiters know they are open to new roles.

Considerations

An excellent opportunity to **engage sales and business development** and employees who may be social media savvy to create a social media strategy.

Link to SMS corporate strategy and ensure you are able to monitor the space- respond to inquiries, commentary, update the page with current news.

Cross post all jobs, career opportunities, upcoming events to all active sites.

Recommended sites to focus on initially- **Facebook, Glassdoor, LinkedIn**

Performance Improvement Plan

Rationale- SMS currently documents performance improvement actions via a performance letter. You may want to consider a more standardized approach that minimize potential variance that may exist in other forms of documentation. (Appendix 3)

Considerations

Regardless of the vehicle used (form, letter, etc) the delivery is critical. This is a component that can be covered in the "Navigating People Management at SMS" program.

Individual Development Planning

Rationale- when done correctly an individual development plan can be a powerful tool for both the manager and the employee. It allows the manager to work directly with their team to align team and individual goals with those of SMS. (Appendix 2)

Considerations

Follow (generally) the 70-20-10 framework. 70% of learning on the job, 20% from peers, 10% formal/classroom.

Skills Inventory

Rationale- creating a database of employee skills can be a useful method of cross training, save SMS resources, and provide a meaningful way for employees to use "hidden skills". Increasingly employees come to organizations after having more than one career journey. Perhaps they were an accountant, or a database architect, or a brick mason in a former career. Knowing and understanding the skill sets of your employees provides an opportunity to access them for special projects or other assignments.

Considerations

Build the data gathering into your existing processes- hiring, performance reviews, quarterly meetings.

APPENDIX 3.
TALENT INVESTMENT GRID

Example of Talent Investment Grid

	Potential		
Performance	**Lowest potential category**	**Middle potential category**	**Highest potential category**
Highest Performance 20%	**Compensation targets:** • Base 50th, Bonus 75th **Development investment:** • 1.5x average **Hi-po program:** No **CEO/board expose:** Maybe **Global move:** No **Special projects:** Yes	**Compensation targets:** • Base 50th, Bonus 75th **Development investment:** • 2x average **Hi-po program:** Consider **CEO/board expose:** Yes **Global move:** Yes **Special projects:** Yes	**Compensation targets:** • Base 60th, Bonus 90th **Development investment:** • 5x average **Hi-po program:** Yes **CEO/board expose:** Yes **Global move:** Yes **Special projects:** Yes
Middle Performance 60%	Compensation targets: • Base 50th, Bonus 50th **Development investment:** • .75x average **Hi-po program:** No **CEO/board expose:** No **Global move:** No **Special projects:** No	Compensation targets: • Base 50th, Bonus 50th **Development investment:** • Average **Hi-po program:** No **CEO/board expose:** Maybe **Global move:** Consider **Special projects:** Yes	Compensation targets: • Base 60th, Bonus 60th **Development investment:** • 2x average **Hi-po program:** Consider **CEO/board expose:** Yes **Global move:** Yes **Special projects:** Yes
Lowest Performance 20%	Compensation targets: • Base 50th, Bonus - None **Development investment:** • None Without TM approval **Hi-po program:** No **CEO/board expose:** No **Global move:** No **Special projects:** No		

APPENDIX 4

DEVELOPING HIGH POTENTIAL /SME

Dave Weeks
Randy Smith
Greg Heintzman

AGILE HIGH PERFORMER

Filipe Gustavo
Chuck Yuris
Yulissa Perfecto
Cody Carrington
Dave Palmer
Maura Myers

CONSISTENT STAR

Bobby Thompson

SOLID PROFESSIONAL

Jeff Lacy	Brice Wolff
Dayle Dodson	Rodney Sykes
Dan Lopez	Casey Smith
Jim Pease	Cindy Levine
Danielle	Alexia
Rembor	Hamilton
Tom Young	Andy Presto
Doug Bushnell	William Ball

KEY PERFORMER

Jerry Corcoran	Randy Schlipp
Bryan Wilt	Ray Shelton
Scott Moerman	Rudy
Stacey Hauptstueck	Monterrubio
Pedro Martinez	Temo Garcia
Martine Favela	Ivis Hernandez
Jamie Hughes	

RISING STAR

Shannon Jordan
Thad Smith
Tim O'Connor
Bobby Heath
Victor Landeros
Dineen Bildstein
Alexis Mueller
Estefani Diaz

SEPARATION RISK

Courtland Acosta
Craig Thornton
Roy Corrigan
Cesar Espino
Eric Grabus

INCONSISTENT PERFORMER

Nick Schlipp	Miguel Garcia
Dan Gertler	Marcus Jackson
Edgar Favela	Adam Furlong
Jose Fernandez	Vicki Ciena
Ken Rutkowski	

HIDDEN GEM

Jason Gertler
Andrew Sanford
Greg Graves
Jose Monterrubio
Eddie Venegas

Why should I have one?

Ability to Realize Potential*

↓ **19%**

100	81
Employee with No Plan	**Employee with an unachievable Plan**

Why should my staff have one?

Employee Discretionary Effort*

↑ **19%**

100	152
Employee Without Achievable Development Plans	**Employee With Achievable Development Plans**

Development Objectives:
Questions to ask yourself.....

Long Term Goals	Short Term Goals	Strengths
• What drives you? • What do you value? • What are you passionate about? • What do you want people to see in you in 2 years+ time • What does success look like for you?	• What successes do you want to build on over the next 6-12 months? • What will success look like in your performance review?	• What energizes you? • What do your customers tell you you do well? • What do your peers regularly seek your assistance with? • When do you enjoy your role/assignment most? • What are your interests?

Experiences	Business Goals	Self-Reflection
• What's the favorite part of your current role? What is the least? • Which part of SMS do you find most interesting and would like to learn more about? • Knowing what you know now, what would you have done differently in your career? • How has your skill set changed and what contributed to that change?	• Where do I see my current role contributing tour business objectives? • What are my manager's business goals? • Is there a specific skill I need in order to meet my performance expectations?	• How can I shed more light on myself and others? • What are the things I appreciate about myself and others? • What have been my best leadership experiences and why were they so good? • What have been some of the happiest times in my life and what can I learn to apply in the future?

Development Plan Template

Employee Name:	Current Position:	Date:

Career Mission Statement—*What do you want to accomplish and why?*

Short-Term Career Goal—*Where do you hope to be in 3–5 years?*

Target Experiences/Knowledge		**Target Competencies (Skills and Attributes)**	
What experiences/knowledge do you need to have? 1. 2. 3.	*By when?* 1. 2. 3.	*What competencies do you need to have?* 1. 2. 3.	*By when?* 1. 2. 3.

Action Plan

Development Goals	Action Steps	Resources	Constraints	Target Date
What are your development objectives, including target experiences and competencies?	*What 2–4 specific actions or activities will help you achieve each goal?*	*What resources, such as management approval, funding, time away from work, will you need to complete each step?*	*What constraints do you anticipate encountering when pursuing each development goal?*	*What is the deadline for each development goal?*
1.				
2.				
3.				

Development Plan Checklist

Category	Step	Completed?
Development Goals	Have I shared the plan with my supervisor/mentor and incorporated their feedback?	
	Does my development plan focus on the skills I need to do my job well now and those I'll need to achieve my future career goals?	
	Does my development plan focus on continuing to build my strengths at least as much as it focuses on closing any gaps?	
	Are my development goals aligned with what the business needs now and in the future?	
	Have I limited my goals to 3–5 development areas?	
	Does my development plan push me out of my "comfort zone?"	
Action Steps	Have I identified a clear action plan that will help me reach my development goals?	
	Have I shared my development goals with others so that they can help me achieve them and hold me accountable for them?	
	Are at least 80% of my action steps tied to my day-to-day job responsibilities and project assignments, and fewer than 20% are training programs?	
Success Measures	Have I created realistic and achievable metrics to measure my progress?	
	Have I tied the metrics to realistic deadlines to assess my progress?	
	Have I established milestones to ensure that I'm on track?	

On-the-Job Development Activities

The following table provides examples of on-the-job activities and stretch opportunities that you can provide to your direct reports to drive on-the-job learning.

Gaining Access to Best Practice	Accepting Broader Responsibility	Undergoing Change and Adversity	Experiencing Challenging Relationships	Persuading and Teaching	Making Difficult Decisions
Employees can see the right way to do their jobs	*Employees can gain valuable experience from larger or harder tasks*	*Employees must learn how to be flexible and adaptable*	*Employees gain interpersonal skills*	*Employees can refine their knowledge and communicate better*	*Employees can assess and think deeply about difficult situations*
☐ Shadow a coworker to see how he/she conducts his/her work	☐ Increase the amount of responsibility	☐ Work in a situation with rapidly changing circumstances	☐ Work with people from other business units, functions, or locations	☐ Persuade a senior manager to take a difficult action	☐ Make a risky decision with potentially adverse consequences
☐ Work with a recognized expert	☐ Undertake a challenging assignment	☐ Handle a crisis or turn around a failing situation	☐ Work with multiple people with contradictory or competing views	☐ Teach coworkers how to do a component of their jobs	☐ Make decision(s) outside area of expertise
☐ Experience a notable success in work	☐ Participate in a group to solve a real business problem		☐ Work with difficult customers or coworkers		
	Fill in for a manager temporarily				

Drive Learning from Work

Once you have identified the right experiences for your development, ensure you derive the maximum learning by intentionally thinking about what you will learn from the experience and reflect on the learning after the experience.

Before Beginning a Task/Activity
• Set goals and targets for yourself. • Plan how to accomplish the task, project, or assignment before beginning it (consult your manager ahead of time where you are unsure of the best, or most feasible, way of accomplishing the task). • Identify ahead of time potential solutions to problems you think you might encounter as you carry out the task. • Think about what you have learned from similar work experiences in the past and how that learning might impact your approach this time. • Build relationships with coworkers who can help you in your task (ask you manager to support you here in identifying and connecting you with appropriate people). • Identify the resources that you will need and work with your manager (or the appropriate person) to ensure those resources will be available to you when you need them.

After Finishing a Task/Activity
• Identify the lessons learned from the experience. • Ask your manager for his/her feedback on how you did the work. • Ask your coworkers and team members for their feedback on how you did the work. • Share what you have learned from the experience with coworkers to boost their learning. • Look for opportunities to teach others (for example, are any of your colleagues struggling with a task where your experience could assist them? Offer to share what that experience taught you that may be able to help them).