Individual development plan (IDP) template

## Overview

This Individual Development Plan (IDP) template helps employees and managers collaboratively define career goals, development areas, and the practical steps required to grow in role, scope, or direction. It ensures professional growth is purposeful, supported, and aligned with both personal ambitions and organizational priorities.

Use this as a living document to revisit quarterly or biannually.

## 1. Development plan overview

What this section is: A top-level summary of what the individual wants to achieve and why.

How to use it: Use this as a shared foundation for the development conversation.

| **Item** | **Notes/example** |
| --- | --- |
| Employee name | Alex Johnson |
| Role/title | Customer success manager |
| Manager | Sarah Lee |
| Timeframe for plan | July–December 2025 |
| Long-term career aspiration | E.g. Become a senior CS leader E.g. Transition into product management |
| Key motivators | Autonomy, meaningful impact, opportunity to innovate |

## 2. Strengths and development areas

What this section is: A reflection on the employee’s current skills and areas for growth.

How to use it: Complete together using feedback, self-reflection, and performance data.

| **Category** | **Strengths** | **Development areas** |
| --- | --- | --- |
| Technical skills | Deep knowledge of CRM tools, analytical mindset | Product knowledge, SQL proficiency |
| Soft skills | Active listening, empathy, team collaboration | Influencing senior stakeholders, presentation |
| Leadership behaviors | Peer mentoring, proactive problem-solving | Strategic thinking, delegation |

## 3. Development goals (SMART)

What this section is: Specific goals focused on capability growth.

How to use it: Create 2–4 SMART goals that are time-bound and measurable.

| **Goal** | **Success measure** | **Deadline** |
| --- | --- | --- |
| Complete advanced product training modules | Score 90%+ on final assessment | September 15 |
| Present to leadership on Q3 churn insights | Deliver clear, confident presentation | October 1 |
| Mentor a new hire in the CS team | Complete 3 shadowing sessions and 2 coaching chats | August 30 |
| Attend external SQL workshop and apply learnings | Use queries in 2 client reports | November 10 |

## 4. Development actions and support

What this section is: Concrete actions the employee will take, and the support/resources they’ll need.

How to use it: Use this to track what’s needed to achieve each goal.

| **Development goal** | **Action steps** | **Support/resources needed** |
| --- | --- | --- |
| Advanced product training | Block 2 hours/week for self-study, complete all modules | Access to learning platform, check-in with product lead |
| Present to leadership | Draft slides, rehearse with manager, gather feedback | Coaching session, example decks from past meetings |
| Mentor new hire | Schedule intro meeting, plan topics, log sessions | Mentorship guide, manager check-in |
| Attend SQL workshop | Register, attend, summarize learnings | Budget approval, time blocked on calendar |

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## 5. Progress and review log

What this section is: A space to track updates, wins, and feedback over time.

How to use it: Review monthly or quarterly to assess momentum and adjust if needed.

| **Date** | **Notes/update** | **Next steps** |
| --- | --- | --- |
| July 25 | Completed first product module, scored 95% | Continue weekly learning |
| August 10 | Mentorship underway—2 sessions held, positive feedback from mentee | Plan final check-in |
| September 1 | Drafted Q3 churn deck and presented in team meeting | Schedule final run-through with manager |

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