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.

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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

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