

Goal Setting & Development Planning Template

Managers and employees should use this document to collaborate on goals. It will help ensure that individuals have realistic goals, with a plan for their own professional development that is aligned with corporate strategy. We've seen great results using this template at TrustRadius, which is why we wanted to share it with other businesses!

Managers must fill in the corporate goals on page 1 (then remove the example to avoid confusion). Employees must fill in the goal setting form & individual development plan on pages 3 and 4. Complete this document once per quarter. Refer to it during quarterly planning meetings and performance reviews.

Corporate Goals

This section to be filled out by management.

The following strategic goals are in place for the upcoming period. Use these as guidance when planning your own goals. Consider how the objectives you set for yourself help the company advance itself.

[Corporate Goal 1] [Target] [How it's measured]	[Corporate Goal 2] [Target] [How it's measured]	[Corporate Goal 3] [Target] [How it's measured]	[Corporate Goal 4] [Target] [How it's measured]
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Example:

Gross Retention 75% % renewable revenue	New Bookings \$10m New and upsell bookings	Online Influence 300k Monthly sessions (run rate)	Team 90% % highly engaged (employee survey)
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Goals for Upcoming Review Period

This section to be filled out by employee.



Goal Setting

Enter three to five performance goals for the upcoming quarter. These goals will be reviewed, clarified, and agreed upon with your manager during your next 1-on-1.

Preferably, individual goals align with those of your department and the company while still furthering your career path.

Goals should be SMART; Specific, Measureable, Attainable, Relevant, Time Bound. Further info on the SMART technique [exists publicly](#).

Individual Development Planning

An individual development plan (IDP) helps facilitate employee development. It's a two-way commitment between an employee and their manager on their growth objectives and the plan to achieve them.

How to Write a Great Individual Development Plan (IDP)

- Start with a goal. Identify what you want to learn, get better at, or accomplish. Things like skills, roles, promotions make great goals as do improvements to things you already do or have.
- Identify the three most important competencies (skills, knowledge, attributes) that you want to work on to achieve your goal.
- Identify “development actions” to address the needs. Here are some common development actions, listed in order of developmental impact:
 - Take on a challenging assignment within your current job
 - Learn from someone else (your manager, a coach, a subject matter expert or role model)
 - Get educated on the topic: take a course, read up on a topic, attend a seminar
 - Participate in an experience inside or outside the company. Present at a meetup, write a blog post, speak with others from your industry are examples of this.

PLEASE SUBMIT COMPLETED FORM TO YOUR MANAGER

Employee Name		Period:	From:	To:
Employee Title		Employee Department:		
Manager Name				
Job Description	[Copy and paste official job description / job requirements here.]			

Goal Setting. Areas of focus / performance goals for period

1. [Put your first SMART goal here.]

- ❖ [Department] Initiative: [Describe department goal it supports here. How does it help your team?]
- ❖ Corporate Goals: [Indicate one or more corporate goals supported.]

2. [Put your second SMART goal here]

- ❖ [Department] Initiative: [Describe department goal it supports here. How does it help your team?]
- ❖ Corporate Goals: [Indicate one or more corporate goals supported.]

3. [Put your third SMART goal here]

- ❖ [Department] Initiative: [Describe department goal it supports here. How does it help your team?]
- ❖ Corporate Goals: [Indicate one or more corporate goals supported.]

Individual Development Plan

[Begin your IDP with a brief statement of purpose. Explain what you are working towards in 2-3 sentences. What is the theme of your SMART goals, the competencies you want to work on, and the development actions you'll take to build them?]

In order to **[first SMART goal]**, the competencies I need to work on are:

1. [List first skill to be developed. What do you need to learn, get better at, or accomplish?]
 2. [List second skill, if applicable.]
 3. [List third skill, if applicable.]
- **Development actions to address these needs:**
 - [Identify first development action. How will you develop the skills listed above?]
 - [Identify second development action, if applicable]
 - [Identify third development action, if applicable]

In order to **[second SMART goal]**, the competencies I need to work on are:

4. [List first skill to be developed. What do you need to learn, get better at, or accomplish?]
 5. [List second skill, if applicable.]
 6. [List third skill, if applicable.]
- **Development actions to address these needs:**
 - [Identify first development action. How will you develop the skills listed above?]
 - [Identify second development action, if applicable]
 - [Identify third development action, if applicable]

In order to **[second SMART goal]**, the competencies I need to work on are:

7. [List first skill to be developed. What do you need to learn, get better at, or accomplish?]
 8. [List second skill, if applicable.]
 9. [List third skill, if applicable.]
- **Development actions to address these needs:**
 - [Identify first development action. How will you develop the skills listed above?]
 - [Identify second development action, if applicable]
 - [Identify third development action, if applicable]
