



Five Steps to Drafting a Meaningful Individual Development Plan

Step I:	Self-Assessment
Step II:	Identify Areas for Development
Step III:	Set Goals
Step IV:	Draft Your Individual Development Plan (IDP)
Step V:	Review and Refine the Plan

Having a strategic Individual Development Plan (IDP) is critical to effective career management. This workbook will take you through the steps necessary to draft a plan that is in alignment with your professional goals and the firm's expectations and needs.

It is designed to take you through a series of steps and exercises that will allow you to:

- Increase self-awareness
- Recognize strengths and identify areas for potential development
- Identify opportunities within the firm to leverage your strengths
- Determine the current and future needs of the firm
- Set goals that are in alignment with your and the firm's needs
- Make educated career decisions now and in the future

Step I: Self-Assessment

VALUES

Self-assessment is the first step in a strategic career management plan. In looking at values, skills, and motivators you gain greater self-awareness that will allow you to set goals, develop an action plan, and ultimately make better educated decisions about your career. Identifying your values is a critical component of a career planning process. When values are met, they contribute significantly to a sense of fulfillment. The following exercise will help you explore your most significant work values. Circle the number (1-4) that best corresponds with the level of importance that you place on each value. Then, identify and rank order the top five values that are essential to your satisfaction in the workplace.

4 – very important / 3 – important / 2 – indifferent / 1 – not important

VALUE	IMPORTANCE
Achievement	1 2 3 4
Advancement	1 2 3 4
Change/Variety	1 2 3 4
Competence	1 2 3 4
Competition	1 2 3 4
Control over schedule	1 2 3 4
Ethics	1 2 3 4
Financial security	1 2 3 4
Helping society/Service	1 2 3 4
High Earnings	1 2 3 4
Independence/Autonomy	1 2 3 4
Influence	1 2 3 4
Intellectual challenge	1 2 3 4
Job security	1 2 3 4
Knowledge	1 2 3 4
Leadership	1 2 3 4
Power/Authority	1 2 3 4
Recognition	1 2 3 4
Public contact	1 2 3 4
Teamwork	1 2 3 4
Work/Life Balance	1 2 3 4

Rank Your Top Five Values:

1. _____
2. _____
3. _____
4. _____
5. _____

SKILLS



The PDC Competencies clarifies the core competencies required to progress and thrive at in your professional development roles. Using the detailed Framework and level descriptions as your guides, consider skills you possess and those you hope to develop or refine.

Areas of Strength:

Areas for Growth:

SKILLS

Using the following list, circle additional skills that you enjoy using in the workplace. Then, star (*) any skills you do not yet have but would like to develop.

Advise	Analyze	Advocate
Brainstorm	Budget	Calculate
Communicate	Conceptualize	Coordinate
Design	Develop ideas	Diagnose
Dissect	Draw people out	Edit
Empathize	Evaluate	Examine
Explain	Follow instructions	Generalize
Give others credit	Help others	Implement ideas
Improvise	Initiate	Innovate
Inspire	Interview	Intuit
Issue spot	Lead	Listen
Lobby	Manage	Mediate
Mentor	Memorize	Negotiate
Network	Organize	Plan
Prioritize	Problem solve	Read
Research	Speak publicly	Strategize
Summarize	Trouble shoot	Write

<p>Strengths:</p> <ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ 4. _____ 5. _____ 	<p>Areas for Development:</p> <ol style="list-style-type: none"> 1. _____ 2. _____ 3. _____ 4. _____ 5. _____
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Step II. Intersection of Your Plan and Business and Market Conditions

Aligning Professional Goals with organizational Goals and the Market

Note what is going on at your place of employment and in the industry that will impact business strategy, my professional interests, and my opportunities.

Business Goals and Strategic Position (*Sources: Executive Board, Managing Partner/Chair communications, President and Deans, Supervisors, website, legal industry news*)

Your Department Business Goals and Strategic Plan (*Sources: Department leads, website, legal industry news*)

Legal Marketplace Conditions (*Sources: The American Lawyer magazine (US) or The Lawyer (UK), Wall Street Journal, Adam Smith, Esq. Legal Economics Blog, American Bar Association*)

Threats and Opportunities

Given what you have identified in terms of skills, areas for development, your organization's business goals, and the legal marketplace, identify your career development priorities:

Rank Order Priorities for Development:

1. _____
2. _____
3. _____

Step III: Setting Goals

Setting goals will give your career plan direction. Consider both your short- and long-term development goals. Answering the following questions will help you in that determination:

Where would you like to be professionally? *Consider: nature of your role, type of work/projects, lifestyle, pay, path to advancement, or people with whom you work, etc.*

In 3 Years:

In 5 Years:

In 10 Years:

Where would you like to be personally? *Consider: health and well-being, relationships, outside interests, financial well-being, etc.*

In 3 Years:

In 5 Years:

In 10 Years:

To what extent are your short- and long-term aspirations aligned with the firm's business goals and the realities of the marketplace? *Consider: level of challenge/growth available, expectations for your performance/contributions, interest in/opportunities for advancement, etc.*

Questions to consider as you develop your goals:

In which of the core professional skill areas do you need more experience/exposure?

Which skills do more senior or more specialized professionals in your department exercise and what steps can you take to develop them?

The type(s) of work you find most interesting.

(Give examples of the work that has most challenged you, that is most interesting to you, or that you want to try.)

To do more of this work, you will need to learn more about the following to develop these skills:
(e.g., substantive areas of professional expertise, specific skills)

What steps can you take to perform your work more efficiently?

(e.g., ways to improve communication, share resources more effectively, manage time better, process innovations needed)

How can you best contribute to the long-term success of the firm?

(e.g., doing the highest quality work, identifying efficiencies and cost savings, developing professional skills, maintaining positive relations with colleagues, participating in firm life)

Step IV: Drafting Your Individual Development Plan (IDP)

While goal setting gives you direction, a strategic IDP gives you a road map and provides a focus that will get you from “where you are now,” to “where you want to be.” Using the “SMART” approach to goal setting will help you develop the action steps to achieve each goal. Make sure that each goal is:

S-M-A-R-T: *Specific, Measurable, Attainable, Relevant, and Timely*

Below is an example of a Goal Worksheet with S-M-A-R-T action steps:

Goal Worksheet	
Goal: To manage a moderately sized project on my own	
Action Steps	Due Date
1. Let my supervisor know I want this type of assignment	April
2. Participate in a webinar on project management	April
3. Observe my supervisors and identify best practices	April/May
4. Read articles on project and people management	May/June
5. Identify a person with whom to share this goal	This week
Obstacles/Challenges	Strategy for Overcoming
1. I've never managed anything before	Learn best practices
2. More senior team members get these roles	Build skills to prepare
3. No projects are available	Be prepared
I will know that I have successfully completed this goal when...:	
<i>Short-term, I have managed a project from start to finish, and long-term, I have successfully managed a high priority project on my own, including people, project, and cost management.</i>	
Additional Notes:	

Goal Worksheet

Goal: _____

Action Steps

Due Date

- | | | |
|----|-------|-------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |
| 4. | _____ | _____ |
| 5. | _____ | _____ |
| 6. | _____ | _____ |

Obstacles/Challenges

Strategy for Overcoming

- | | |
|----|----------------|
| 1. | _____
_____ |
| 2. | _____
_____ |
| 3. | _____
_____ |

I will know that I have successfully completed this goal when...

Additional Notes:

Goal Worksheet

Goal: _____

Action Steps

Due Date

- | | | |
|----|-------|-------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |
| 4. | _____ | _____ |
| 5. | _____ | _____ |
| 6. | _____ | _____ |

Obstacles/Challenges

Strategy for Overcoming

- | | |
|----|----------------|
| 1. | _____
_____ |
| 2. | _____
_____ |
| 3. | _____
_____ |

I will know that I have successfully completed this goal when...

Additional Notes:

Goal Worksheet

Goal: _____

Action Steps

Due Date

- | | | |
|----|-------|-------|
| 1. | _____ | _____ |
| 2. | _____ | _____ |
| 3. | _____ | _____ |
| 4. | _____ | _____ |
| 5. | _____ | _____ |
| 6. | _____ | _____ |

Obstacles/Challenges

Strategy for Overcoming

- | | |
|----|----------------|
| 1. | _____
_____ |
| 2. | _____
_____ |
| 3. | _____
_____ |

I will know that I have successfully completed this goal when...

Additional Notes:

Step V: Reviewing and Refining Your Plan

- Share your plan with a mentor and supervisor and get their input and approval that you are moving in the right direction
- Discuss with your supervisor whether the goals you have set for yourself are both realistic and achievable and in alignment with department and firm goals
- Brainstorm action steps and time allocation with your supervisor
- Ask for assistance in assessing progress on a quarterly basis
- Seek guidance from other senior administrators in your department, colleagues, and others to get a wide range of perspectives on your plan
- Monitor goal attainment and continuously update your plan