



Employee Success & Development Plan

Date: _____

Last Review Date: _____

HOW TO USE THIS SUCCESS AND DEVELOPMENT PLAN

This worksheet is designed to guide a meaningful conversation between the employee and manager focused on growth, performance, and future goals.

The employee should complete the Self-Reflection and Self-Assessment sections prior to the one-on-one meeting. The manager should review these responses in advance to prepare feedback and discussion points.

During the meeting, the employee and manager will discuss strengths, opportunities for growth, and align clear, actionable goals. Both will work together to identify next steps, resources, and follow-up plans. This is a shared process focused on development, accountability, and ongoing success.

Employee Information

Name: _____

Title & Position: _____

Department/Branch: _____

Step 1: Self-Reflection *(To be completed by the employee prior to the one-on-one meeting.)*

- What accomplishments are you most proud of since the last review?

- _____
- _____
- _____

- What challenges have you faced, and how did you overcome them?

- _____
- _____
- _____

- What skills would you like to develop further?

- _____

- _____
 - _____
 - **What support or resources do you need to succeed?**
 - _____
 - _____
 - _____
-

Step 2: Self-Assessment *(To be completed by the employee before the one-on-one meeting.)*

Rate yourself on a scale of 1-5: 5 - Excellent, 1 - Needs Improvement.

- ____ Job Knowledge & Skills
 - ____ Communication & Teamwork
 - ____ Initiative & Problem-Solving
 - ____ Customer/Member Focus
 - ____ Adaptability & Growth Mindset
 - ____ Business Development & Results
-

Step 3: Manager Feedback & Support *(The manager will review the self-reflection and self-assessment, taking notes to prepare for the one-on-one.)*

- **Manager's Observations & Comments:**
 - _____
 - _____
 - _____
- **Opportunities for Growth & Improvement:**
 - _____
 - _____
 - _____
- **Resources & Support Provided by Manager:**
 - _____
 - _____
 - _____

Step 4: Goal Setting *(The manager and employee will collaborate to set goals, ensuring alignment.)*

- **Next 3 Months Goals:**

- _____
- _____
- _____

- **Long-Term Career Goals:**

- _____
- _____
- _____

- **Action Steps to Achieve These Goals:**

- _____
- _____
- _____

Step 5: Commitments & Next Steps *(The manager and employee will collaborate to set mutual accountability.)*

- **Key Milestones & Check-Ins:**

- _____
- _____
- _____

- **Next Review Date:** _____

Signatures

Employee Signature: _____

Manager Signature: _____

Date: _____