Career Development Action Plan Template Example

Employee	Brian Gorman
Job Title	Financial Analyst
Department	Corporate Finance
Manager/Reviewer	Brooklyn Johann
Plan Date	MM/DD/YY

Career Goals (SMART)

SMART	Goal	Timeframe
Specific	Develop expertise in financial forecasting and data visualization	One year
Measurable	Complete two advanced Excel modeling courses and one forecasting project	By Q2 20XX
Achievable	Utilize company-provided training and mentorship support	Ongoing
Relevant	Enhance financial reporting accuracy, align with career progression	Immediate impact
Time-Bound	Present a forecasting model to senior leadership	By Q4 20XX

Strengths and Work Style Analysis

Category	Description
Key Strengths in the Workplace	Analytical mindset, problem-solving skills, attention to detail
Preferred Work Style	Independent with structured collaboration
Best Learning Methods	Hands-on projects, interactive training, mentorship
Ideal Work Environment	Fast-paced, data-driven, cross-functional collaboration
Challenges and Growth Areas	Public speaking confidence, stakeholder communication

Skills and Competency Development

Skill Category	Current Level	Target Level (by Year 1)
Financial Modeling	Intermediate	Advanced
Data Analysis	Entry	Expert
Leadership and Communications	Developing	Proficient
Risk Assessment	Basic	Advanced

Training, Education, and Certification Costs

Category	Description	Estimated Cost
Company-Sponsored Training	Advanced Excel and Data Analytics Course	$350.00
Certification and Licensing	CFA Level 1 Certification	$1,200.00
External Education Programs	Financial Analysis Bootcamp	$800.00
Conferences and Seminars	Annual Finance Leadership Summit	$950.00
Technology and Tools Needed	Tableau License, Bloomberg Terminal Access	$1,500.00

Action Plan

Improvement Activity	Target Date	Owner	Status
Advanced Excel and Data Analytics Training	MM/DD/YY	Employee	In Progress
Level 1 Financial Forecasting Project	MM/DD/YY	Employee	Not Started
Cross Training in Corporate Strategy	MM/DD/YY	Employee	Not Started
Industry Conference Participation	MM/DD/YY	Employee	Scheduled
Promotional Readiness Assessment	MM/DD/YY	Manager	Pending
Next Review	MM/DD/YY	Manager	Pending

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Advanced Training						X						
Leadership Project												
Cross Training												
Networking and Development							X					
Promotion Readiness Assessment											X	

Success Metrics and Evaluation

Metric	Description	Measurement
Key Performance Indicators (KPIs)	Improvement in forecasting accuracy, dashboard efficiency	Weekly and monthly reports
Promotional Readiness Review	Assessment of leadership and technical skills for advancement	Self and annual quality audits
Performance Review Schedule	Biannual review of progress toward goals and skill application	Manager evaluations
Feedback Collection Methods	360-degree reviews, self-assessment, peer feedback	Survey data and review reports

Career Advancement

Category	Description	Action Steps	Target Date
Target Future Role(s)	Senior Financial Analyst	Develop leadership and forecasting expertise	MM/DD/YY

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Emilie Sanchez

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