

BETTER HAPPY EMPLOYEE PERSONAL DEVELOPMENT PLAN TEMPLATE

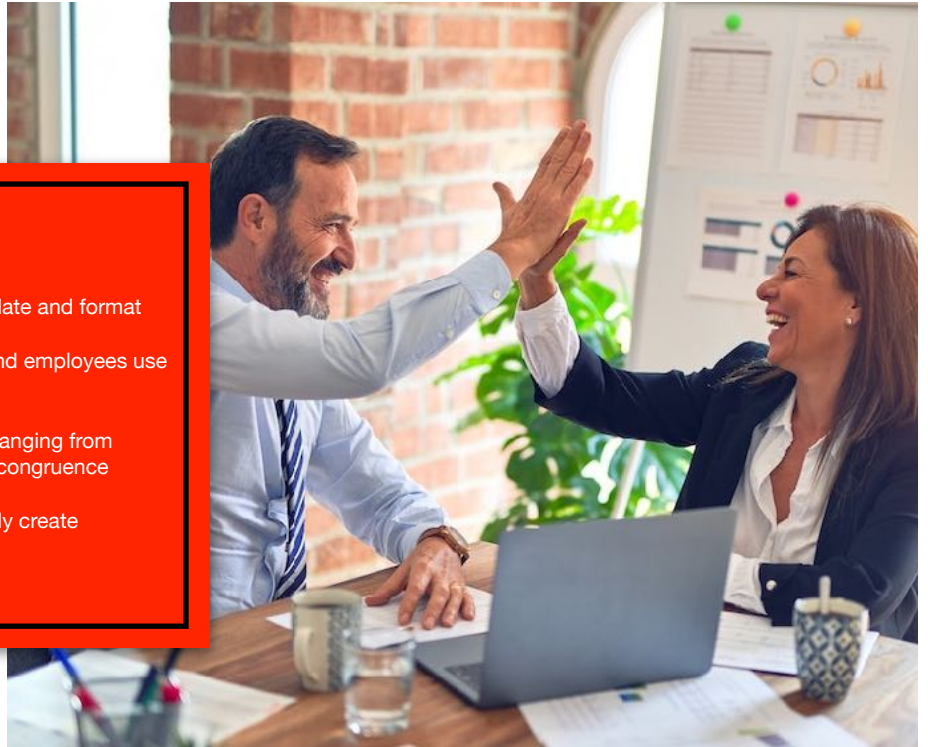


**How to Make Employee
Check Ins Rewarding, Powerful
& Enjoyable**

PDP RESOURCE

What you get from this resource

- A ready to use employee 'check in' template and format
- 2 way resource that both management and employees use to ensure ongoing personal development
- Pre formatted tools to track key metrics ranging from motivation levels, to mental wellbeing to congruence
- Clear KPI and job review sections to easily create meaningful conversations



PDP Resource

We created this to help you and your people work together to make the quarterly check in process an enjoyable, rewarding and extremely useful of both parties.

We don't like the term 'performance review'. We encourage managers and leaders to think of themselves as **development coaches**.

If you view your role as primarily having to manage people's performance and keep them motivated then something is wrong, maybe:

- Lack of core values - not recruiting the right people
- Lack of vision and communication - people aren't motivated
- Having the right people in the wrong roles
- A lack of clarity of what's required in each role

Whatever it might be, the format laid out here will help you identify whatever it is.

Hopefully you view your role as inspiring, motivating and developing your people and you're using this resource to further improve the positive impact you are having on your peoples lives.

There's a lot to think about in any job or business, the structure in the guide will help make sure you get the most out of every check in without having to think about it.

This tool makes the check in process a two way responsibility. Employees will think about and review their own lives, performance and goals as well as the manager reviewing performance.

Using this process or adapting it and making it your own will ensure that you develop powerful relationships with your people which is **only a Win Win situation**.

Win for the employees, win for the leadership, win for the business, win for the customers. We hope you enjoy.

BEST PRACTICE

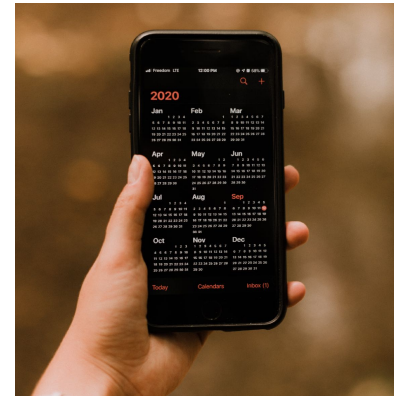
The PDP is a two way tool to be utilised by both the management and the employees / team members. Utilising this in your organisation is an ongoing process that you will refine and perfect as time goes on. The format outlined will provide instant value to any check in done.

01 Set and stick to dates/time

The check in process is an essential part of the running and growth of your organisation but can sometimes be tempting to skip.

“I’m too busy to do that today”, “My people look happy, we can skip reviews this month”.

No matter how happy your people seem, they need to know you’re invested in them and that you’re helping them grow. We recommend doing reviews every quarter and allowing 30-60 minutes per person. Set review dates in advanced, stick to them, and remind both parties 1 month and 1 week before.



02 Give time for prep

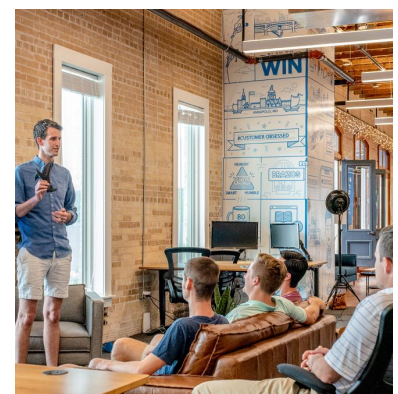
This process changes the dynamics of the ‘performance review’ check in and makes it a two way exchange. Therefore you need to make sure that manager/leader has time to review the employee who is checking in and the employee has time to do their review and prep work also. They should be encouraged to do this in work time. By doing this the check in won’t feel rushed. The manager/leader will feel clear on the check in and look forward to it. The employee will benefit across their whole life from doing their own review and also look forward to the session. On a final note, giving the employee time to prep will also ensure highly useful business insights come through.



03 Take it seriously

The team within an organisation make or break it. Being in a management or leadership position can often be stressful and create a huge variety of different situations that require your attention. When this happens it can be tempting to offset check ins or rush them in. Don’t fall into this trap. When you take your check ins seriously the benefits you receive from them will always be more than 10x the time and work put in.

You showing your people that your genuinely interested them will benefit the long term growth of your organisation more than any other reward.



Manager Resource

Distribute to each member of your team

01 LIFE REVIEW

Name: _____ Date: _____
Check in No: _____

My Life:
A chance to reflect on the whole of me

Wheel of 8th

A circular diagram with eight segments: Career, Finances, Health, Family & Friends, Relationships, Personal Growth, Fun and Recreation, and Personal Growth.

Motivation

1	○○○○○○○○○○
2	○○○○○○○○○○
3	○○○○○○○○○○

Mental Wellbeing ○○○○○○○○○○

Strengths Congruence ○○○○○○○○○○

Confidence in role ○○○○○○○○○○

Personal Reflection 90 days

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01 - Life Review

‘When people are emotionally invested, they want to contribute’

Show people you care about them and they’ll perform optimally for you.

The life review section of the PDP enables your employees to step back and review their lives as a whole. This exercise alone is of immense value to your people. This also enables the leadership/management of your organisation to really understand what’s going on with your people and see how you can most powerfully help them.

02 PROFESSIONAL FEEDBACK

My Role:
A two development discussion, changes I think would help, what would help me

What’s been done well

Recognition

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

Achievements

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

My upward feedback & suggestions:

Analyser

Q1/2	Q2/2	Q3/2	Q4/2	Q1/3	Q2/3	Q3/3	Q4/3	Q1/4	Q2/4	Q3/4	Q4/4
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Role Review

Most frequent areas for growth:

My Scores

	Month 1	Month 2	Month 3
MP1	_____	_____	_____
MP2	_____	_____	_____
MP3	_____	_____	_____
MP4	_____	_____	_____
MP5	_____	_____	_____

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02 - Professional Feedback

“Train people well enough so they can leave, treat them well enough so they don’t want to.”

Make sure the right people are in the right seats, then work together as a team to develop them.

This section allows both the manager and the employee to review performance at work. The tools in this section give both parties a good, honest overview of performance. From this will come a very clear action plan to enable ongoing performance development areas.

03 GOALS AND DEVELOPMENT

90 Day Action Plan:
How am I going to grow in my personal life and career over the next 90 days

Dreams & Goals (1-10 Years)

1	2	3	4	5
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One-Year

1 Year goal	Why is it important?

Quarter

Quarter	Strategy

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03 - Goals and Development

“When people are progressing, they are much less likely to start looking around for another job. It is when they don’t feel that they are advancing that they start to get restless.”

Helping your people plan to achieve their personal goals as well as professional goals is one of the most powerful things you can do to engage and retain your people.

When people are moving towards goals, they thrive. The process of helping your people visualise and achieve their goals will mean the world to them. The employee should establish their own personal goals. The manager should support the employee to establish career goals.

Personal Development File

Your Name

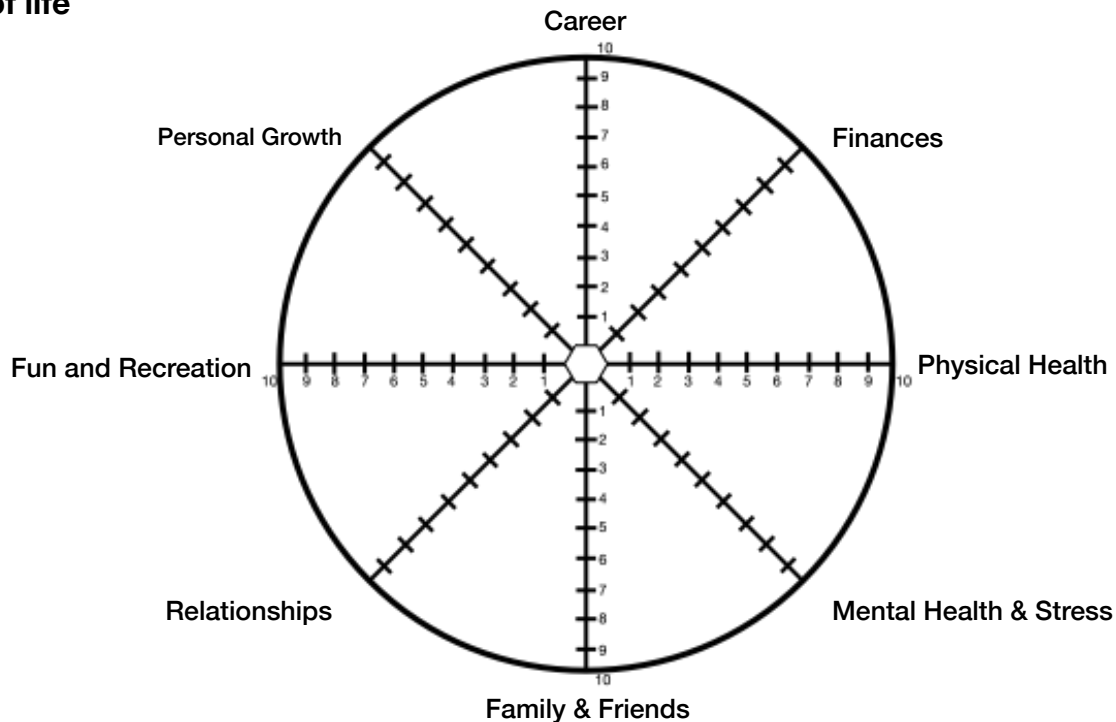
01 LIFE REVIEW

Name:
Date:
Check In No:

My Life:

A chance to reflect on the whole of me

Wheel of life



Motivation

1	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩
2	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩
3	① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

Mental Wellbeing ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

Strengths Congruence ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

Confidence in role ① ② ③ ④ ⑤ ⑥ ⑦ ⑧ ⑨ ⑩

Personal Reflection 90 days

02 PROFESSIONAL FEEDBACK

My Role:

A two development discussion, changes I think would help, what would help me

What's been done well

Recognition

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

Achievements

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

My upward feedback & suggestions:

Analyser	Cv1	Cv2	Cv3	Cv4	Cv5	Get It	Want It	Capacity

Role Review

Most Impactful Areas for growth:

My Scorecard	Month 1	Month 2	Month 3
KPI 1			
KPI 2			
KPI 3			
KPI 4			
KPI 5			

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One-Year

Quarter

One-Year		Quarter	
1 Year Goal	Why is it important?	Quarter	Strategy
1		1	
2		2	
3		3	
4		4	
5		5	

EXTRA SHEETS / RESOURCES

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GOAL TRACKER

YEAR

1-Year Goal	Why is this goal so important?	What's the truth about your current situation?	Available Resources and people to support you.

GOAL TRACKER

QUARTER

First Quarter Goal	Obstacles	Strategies	Specific Actions

**“Your number one customers are
your people. Look after
employees first and then
customers last.”**

Ian Hutchinson, author of People Glue