Sample Individual Career Plan

Part One: Career Objectives and Self-Development Goals

While you have primary responsibility for your own career development, conscientious planning coupled with effective discussions with your Career Advisor can achieve optimal growth for you and our organization. As guidance for your completion of this form, please remember that career objectives should relate to those achievable within our organization and should be:

- Realistic
- Specific
- Measurable
- Appropriate to your level of experience
- Attainable in specific time frames
- Listed in order of preference
- Supported by plans for achievement

The following aspects should also be considered when writing your self-development goals:

- Development of technical ability
- Development of personal skills
- Professional and community involvement
- Development of others (depending on your career level)

By the end of each career planning session with your Advisor, you should both agree on your self-development goals and plans for achieving them. Please sign and date this form on the appropriate line and retain a copy for your records.

For Advisee

1.) At this point in your career, what do you consider to be your major professional and personal strengths?

2.) In what professional areas do you feel you need improvement?

3.) What is your long-term objective (four years or more) within our company? (See above for parameters of a career objective.)

4.) What self-development goals (up to two years) will assist you in attaining your career objective? Please list your plans for achievement and rank in order of importance.

<table>
<thead>
<tr>
<th>Self-Development Goals</th>
<th>Plans for Achievement</th>
<th>Date</th>
<th>Advisor Initials</th>
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5.) What can we do to assist you in accomplishing your self-development goals?
For Advisor

6.) How should our organization respond to facilitate the achievement of these goals?

7.) How do you plan to personally facilitate the achievement of these goals?

Acknowledgements

Please sign and date to acknowledge that the above has been discussed satisfactorily.

<table>
<thead>
<tr>
<th>Employee</th>
<th>Date</th>
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<tr>
<td>Advisor</td>
<td>Date</td>
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Part Two: Incentive Plan

This Incentive Plan is intended to:

- Reward exemplary performance
- Provide objective measurement for incentive compensation
- Clarify performance expectations of your role
- Guide behaviors considered essential for success
- Provide a metric for rating productivity and effectiveness

Performance Measurement Areas / Competencies:

- I. X possible points
- II. X possible points
- III. X possible points
- IV. X possible points

Performance Scoring:

<table>
<thead>
<tr>
<th>Points</th>
<th>Bonus</th>
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<tr>
<td>X</td>
<td>4%</td>
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<td>X</td>
<td>5%</td>
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<td>X</td>
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<td>9%</td>
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<td>X</td>
<td>10%</td>
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Bonus Period and Payments (Sample language)

- This is an annual bonus program.
- For the current year, it begins X and ends X.
- Earned bonuses will be paid by X. You must be employed at the time of payout to receive the bonus.
- The individual’s annualized base salary as established on X of the bonus period (prior year) will be used in the bonus calculation.

Scoring Ideas: Points

Professional Development
- Staff / Peer / Manager evaluations of employee
- Speaker for internal presentation (Lunch ‘n Learn, etc)
- Speaker for external presentation (industry conference, etc.)
- Publish article or be featured subject of article in business or trade publication
- Attend a professional development seminar or conference
- Earn a regional professional or service award (e.g. “40 Under 40”, etc.)

Business Development
- Generate opportunity & meeting with prospect in connection with a proposal or sale
- Meet with a prospect as part of proposal team in connection with a proposal
- Attend a client dinner or other event hosted or sponsored by your client to show support for their initiatives

People Development
- Timely performance assessments of staff (if applicable)
- Serve as a mentor for an associate (if applicable)
- Participate in on-campus interview/job fairs

Community Service
- Serve as President of community or trade organization
- Serve on the Board or as an officer of community or trade organization
- Serve on a Committee of community or trade organization
- Initiate a company- or department-wide volunteer project and coordinate the team

Discretionary component:

You may want to consider including an additional discretionary component to cover outstanding performance in areas that may be more subjective to the individual, including

- Client satisfaction – quality of client relations and service
- Contributing to the success of others
- Personal growth & development
- Good citizenship (exceptional service on internal committees, cross-selling, etc.)
- Contributions to knowledge management / succession planning
- Innovative ideas
- Excessive business travel
- Sales behavior and outcomes outside the scope of the plan
- Any extraordinary area of accomplishment as determined by management