**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=12344&utm_source=template-word&utm_medium=content&utm_campaign=Example+Career+Development+Action+Plan-word-12344&lpa=Example+Career+Development+Action+Plan+word+12344)Career Development Action Plan Template Example**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Employee | | | Brian Gorman | | | | | | | | | | | | | | | | | | | | | | |
| Job Title | | | Financial Analyst | | | | | | | | | | | | | | | | | | | | | | |
| Department | | | Corporate Finance | | | | | | | | | | | | | | | | | | | | | | |
| Manager / Supervisor | | | Brooklyn Jansen | | | | | | | | | | | | | | | | | | | | | | |
| Plan Date | | | MM/DD/YY | | | | | | | | | | | | | | | | | | | | | | |
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| **Career Goals (SMART)** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **SMART** | **Goal** | | | | | | | | | **Timeframe** | | | | | | | | | | | | | | | |
| Specific | Develop expertise in financial forecasting and data visualization | | | | | | | | | One year | | | | | | | | | | | | | | | |
| Measurable | Complete two advanced Excel modeling courses, lead 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 5)** | | | | | | | | | | |
| Financial Modeling | | | | | Intermediate | | | | | | | Advanced | | | | | | | | | | |
| Data Analysis | | | | | Strong | | | | | | | 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 | | | | | | | | | | | | | $500.00 | | | | | |
| 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 | | | | | | | | | | | | | $900.00 | | | | | |
| Technology and Tools Needed | | Tableau License, Bloomberg Terminal Access | | | | | | | | | | | | | $1,500.00 | | | | | |

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| **Action Plan** | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Improvement Activity** | | **Target Date** | | | | | | | **Owner** | | | | | | | | **Status** | | | | | | | | |
| Advanced Excel and Data Analytics Training | | MM/DD/YY | | | | | | | Employee | | | | | | | | In Progress | | | | | | | | |
| Lead in 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** | |  | |  | |

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| **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 | | Call and email 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 | | | |
| Required Skills & Competencies | | | Budget planning, financial risk assessment, stakeholder management | | Complete targeted training, lead projects | | | | MM/DD/YY | | | |
| Leadership and Growth Opportunities | | | Supervise interns, present financial insights to executives | | Volunteer for leadership assignments | | | | MM/DD/YY | | | |
| Networking and Professional Development | | | Engage with finance professionals, attend industry events | | Join professional finance associations | | | | MM/DD/YY | | | |
| Support and Resources Needed | | | Managerial mentorship, project leadership opportunities | | Request additional responsibilities | | | | MM/DD/YY | | | |
| **Self-Assessment and Feedback** | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| **Category** | | **Employee Reflection** | | | | | **Manager Feedback** | | | | | | |
| Career Progress | | Stronger analytical skills, growing leadership presence | | | | | Excels in data-driven decision-making | | | | | | |
| Challenges and Roadblocks | | Need more exposure to executive communication | | | | | Should take on more stakeholder-facing projects | | | | | | |
| Professional Strengths | | Strong problem-solving and financial modeling ability | | | | | High technical aptitude, quick learner | | | | | | |
| Future Focus Areas | | Refining leadership, public speaking, strategic planning | | | | | Continue growing executive communication skills | | | | | | |
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| Review and Acknowledgement | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Reviewed By | Employee | | | | | | | | | | | | |
| Title | Financial Analyst | | | | | | | | | | | | |
| Name | Brian Gorman | | | | | | | | | | | | |
| Date | MM/DD/YY | | | | | | | | | | | | |
| Reviewed By | Manager / Supervisor | | | | | | | | | | | | |
| Title | Project Manager | | | | | | | | | | | | |
| Name | Brooklyn Jansen | | | | | | | | | | | | |
| Date | MM/DD/YY | | | | | | | | | | | | |

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