**Career Development Action Plan Template Example**

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| 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 |
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| **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 |
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| **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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