

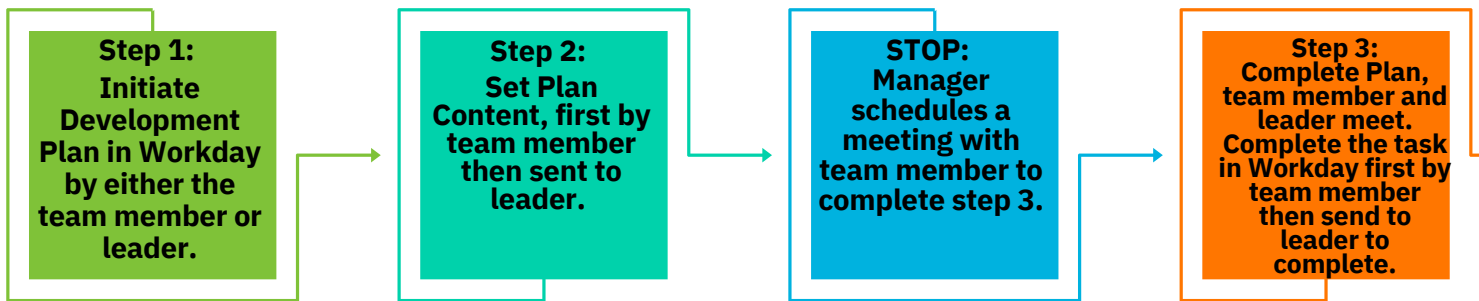
Individual Development Plan: How to implement an IDP

An Individual Development Plan (IDP) is a tool in Workday to assist with planning career and professional development in a measurable and meaningful way. IDPs should be used to help stretch and grow a team member beyond their current core job duties.

An IDP is an on-going activity and should be viewed as a partnership between the leader and team member to help develop and support performance.

This resource will guide the leader and team member through the Workday template to develop and document the plan.

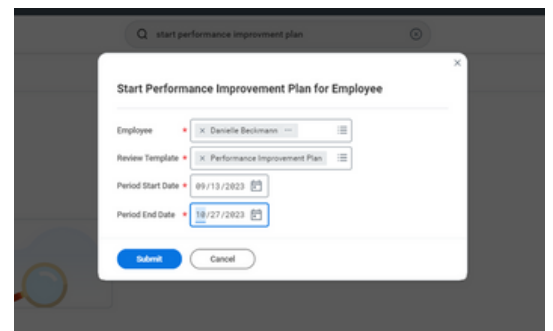
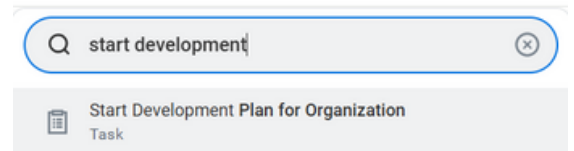
For documenting follow up conversations and progress, view the Review Saved and Submitted Development Plans resource.



Step 1: Initiate Development Plan in Workday

A development plan can be initiated in Workday by the team member or leader.

1. Type **Start development Plan** into the search bar and choose the task accordingly.
2. Fill out the prompts in the pop up box.
 - **Review template:** choose individual development plan.
 - **Period start date:** date you are beginning the plan
 - **Period end date:** Date you set to have the plan, we recommend a 90 day plan
 - **Click “submit” which sends it to the team member to begin filling out the plan.**



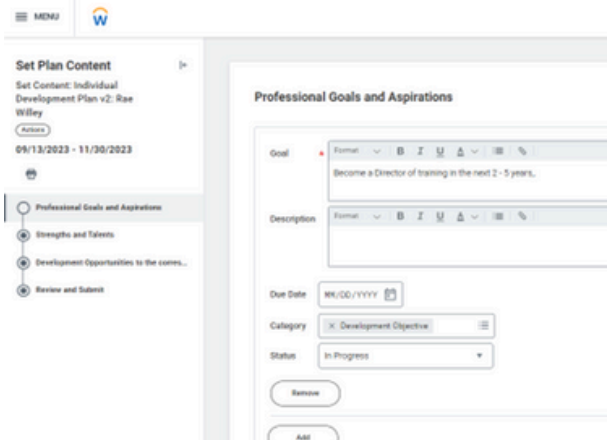
Step 2: Set Plan Content

The team member will fill out the plan first, then send it to the manager to review and add to and adjust the plan.

1. The **team member** opens the task in their Workday task box, **select Get Started**.
2. Complete each of the 3 sections of the development plan by **selecting Add** and filling in the fields; outlined in the images and instructions following.
3. Review your IDP and **submit** if you are completed. This will go to the team members leader.

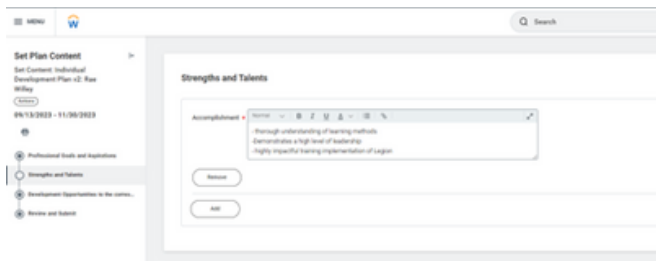
Leaders will complete this same process in their task box, making updates or adjustments to the team members plan.

Professional goals and aspirations



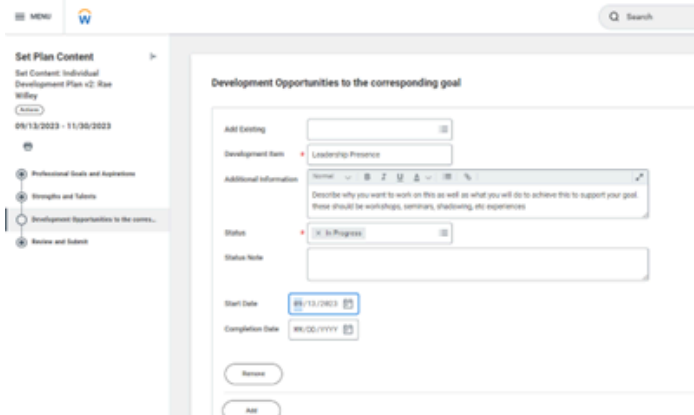
- **Select add**
- **Fill in Content**
 - **Goal**-the goal you want to achieve for your development, goals should be specific, measurable, achievable, relevant, and time bound.
 - **Description**-any additional information you want to provide related to your overall goal.
 - **Due date** and **category**
 - Select **in progress** for the **status**
 - Select **next**

Strengths and Talents



- **Select add**
- **Fill in Accomplishments** that have helped you reach this point so far and will help you in the future to achieve your goal.
- Click **next**

Development Opportunities to the Corresponding Goal



- Select **add**
- Fill in the **related fields**
 - **Development item:** enter the competency or skill you will want to develop and a corresponding goal. **Example-**if development opportunity is “communication skills” the goal might be a satisfactory grade for a course on active listening or public speaking.
 - **Update the Status** as it relates to completion of the development progress.
 - **Select the start date** and input the completion date when complete

STOP!

Once the leader has completed their portion of Step 2, Set Plan Content, the IDP will then be in a ‘hold’ in the leaders task box for them to send and review the IDP with the team member.

- **Schedule to meet** with the team member to have the **one on one discussion**. Leave the task in your inbox until the meeting.
- Select **submit** on the task when you are ready to send to the team member for the meeting.

Step 3: Complete Plan (finalize)

The leader and team member will meet to review the plan and discuss. It will be sent to the team member to input any updates or comments during the discussion and then sent back to the leader to do the same.

1. The **leader sends** the plan to the team member.
2. **Team member** opens the task in their Workday task box, **select Get Started**.
3. **Leader and team member review** the IDP together, the **team member** can make **edits** and **updates** as well as **add comments**
4. **Submit** the document to route back to the **leader** to do a **final review** of the team members plan.

Schedule Ongoing Touch Bases

The leader will need to schedule ongoing touch bases to ensure progress and support of the IDP. Progress and discussion should be added to the development items under the team members profile in workday. See the training resource to View Saved and Submitted Development Plans.

- Minimum of bi-weekly touch bases to follow up on progress and to discuss support needed
- Touch bases at 30/60/90 days are required