

Sanlam Group

Taking Ownership of Your Individual Development Plan



What is an Individual Development Plan?

An Individual Development Plan, or IDP, is a tool used to set and track your developmental goals.

Why do we have IDPs?



IDPs drive engagement through continual development.



IDPs encourage lifelong learning.



IDPs provide direction.



IDPs help us identify opportunities for growth and improvement.



IDPs prepare team members for their next role.



IDPs help us remain relevant in our industry.



IDPs increase our marketability as talent.



Creating Your IDP



Step 1: Reflect

Consider your current skills against those needed to perform well in your role. Are there any areas that you need to focus on developing? If so, make a note of these. At the start of your journey your goals will be focused on mastering your role, but they will evolve with time.



Step 2: Goal setting

Think about your professional goals. Where would you like to be in a year? In two years? If the developmental areas identified in Step 1 relate to these goals – see whether you need to break them down into smaller goals. Once you are performing well in your current role, you can start noting down goals that relate to your career aspirations.



Step 3: Identify actions

Identify what resources you will need to achieve your goals. Are there people in the organisation that can help you? Do you need to complete any courses? Indicating the actions you need to take to achieve your goals will assist you in making your goals more specific and attainable.



Step 4: Refine

Work with your Line Manager to ensure that your goals are SMART and aligned with team and organisational goals. Your Line Manager will be able to advise you on whether your goals are realistic, as well as assist with identifying steps to take towards achieving your goals.



Step 5: Determine milestones

Identify the steps and indicate when you hope to complete each one by. Try to align these timelines with when you will have your review sessions.



Step 6: Review and update your IDP

You will have formal sessions with your Line Manager during which you will revisit and revise your IDP. During these sessions, you will look at which goals you achieved and if some of your goals were not achieved, consider the reasons for this. During these reviews, goals can be removed and replaced once accomplished. They can also be adjusted if you discover that your original goals were not realistic.

Note:

You should also review your goals between the formal sessions with your Line Manager. Taking ownership of your development, means keeping your goals in mind and proactively seeking assistance where needed.

Setting and Achieving Your Goals

Where do goals come from?

Performance reviews

During your performance reviews you might uncover goals that relate to your current role and indicate performance areas where you, or your Line Manager, feel that you can improve.

Career conversations

Career conversations can be used to identify skills that you need to develop in order to enrich yourself, prepare for future opportunities, and reskill or upskill to remain relevant and marketable in the future.

Criteria

When creating your goals, you need to ensure that they are **SMART**.

This means that they need to be:



Specific



Measurable



Attainable



Realistic



Time-bound

Example of a SMART goal

I would like to increase my customer-service rating by 0,5 from 2,5 to 3 points in the next three months by completing the training course on improving customer service.

- **Specific:** Increase my customer-service rating by 0,5 points
- **Measurable:** 0,5 points
- **Attainable:** Training is available and 3 months is a reasonable time to improve from 2,5 to 3, but 2,5 to 5 wouldn't be attainable over 3 months
- **Realistic:** 0,5 points (depends on current rating)
- **Time-bound:** Next three months



Achieving your goals

Here are some suggestions for ways you can achieve your IDP goals:

- Formal training
- Access learning on skillsoft
- Speak to your Line Manager
- Do your research
- Set time aside to do what you have planned

skillsoft

Click here to access the skillsoft Learning platform which is part of the Learning Module on myWorkSpace. It provides opportunities to address broader Learning and Development needs that respond to rapidly changing and shifting business needs, while strengthening and supporting our culture and talent framework.



To learn more about goal setting you can download our **Performance and Goal Management Quick Reference Guide**.



You can also refer to your cluster specific tools for more information.