

Client Name
Leader Name
Personal Development Plan

I. ESTABLISH FOCUS and DIRECTION

A. To improve communication

Provide better planning and structure to meetings

Establish formal meeting agenda to be used during my 1:1 with direct reports, senior staff meetings, and all staff meetings.

- Prior to the meeting, no less than 24 hours in advance, circulate the meeting agenda and material to those in attendance by Date
- Establish meeting protocols by Date
- Working through my Administrative Assistant, communicate to meeting leader and/or senior staff my ability to participate due to schedule conflicts by Date
- Distribute the previously agreed Ground Rules of Engagement, obtain agreement from senior staff of appropriateness, and hold senior staff and me accountable by Date.
- Establish meeting protocol with senior staff, that if they are unable to attend meeting, they are expected to send e-mail to participants by Date.
- Solicit feedback and suggestions from direct reports on effectiveness starting in Date.

Become cognizant of impact to others

Improve verbal communication by being more concise, thinking thoughts through first, before responding with articulate direct statements.

- Prior to speaking, think through exactly what key elements need to be communicated and relay in a focused manner
- Keep on topic
- Minimize what is said, condense thoughts and articulate succinctly after thinking through thought- remember “less is more”

Be aware and do not interrupt staff and direct reports

- Communicate directly through direct reports instead of asking staff for answers
- Be respectful of direct reports time and privacy, do not enter office without permission, and do not interrupt if on phone calls.

Respond to others based on individuals’ style

- Becomes aware of each person’s communication style and how they relate to me.
- Be aware of the level of person to whom I am speaking with, communicate at that person’s level

Utilize written communication

Make written communication clear and concise and respond to appropriate individuals

- Before sending out, make sure all points are succinct and easily understood
- Be aware that my communication is being viewed as a leader, so I need to use proper tone depending on the targeted audience
- Take inventory of number of responses to communications and if there are more than three responses, establish meeting to ensure expectations are clear and that there is agreement
- Become more effective at cascading written communications to direct reports by Date

B. To provide leadership

Provide clear vision around purpose, values, image, and goals.

- Solicit input from direct reports regarding the health plan's Mission, Vision and Values by Date.
- Communicate health plans revised Mission, Vision and Values to staff by Date
- Solicit input from direct reports on Year Winning Priorities by Date
- Conduct strategic planning session with my direct reports to determine how to achieve and measure Year Winning Priorities by Date
- Conduct regularly scheduled 1:1 meetings with my direct reports to review progress on individual, department and health plan goals and discuss other actionable items by Date.

Solicit both formal and informal feedback

- Solicit feedback from Manager on my direct reports personal development plans and goals, department goals and confirm by Date.
- Provide Manager quarterly report on status of developmental plans and goals beginning on Date.
- Solicit regular feedback and suggestions for improvement starting January 1, Year from at least three members of management, peer groups, others or direct reports

C. To ensure accountability

Establish statement of next steps and actions to be taken

- Obtain agreement from direct reports on status of achieving winning priorities, department goals, personal development plan, and issues.
- Utilize 1:1 meeting template to document list of next steps and action items that must be accomplished to meet stated winning priorities, department goals, and identified high priority issues
- Demonstrate responsiveness to my direct reports and assist them by removing barriers by Date

- Solicit input and regular feedback from Manager and direct reports on actionable items and suggestions for improvement by Date.

II. DRIVE ORGANIZATIONAL EXECUTION

A. To improve communication

Provide better day to day coaching and encouragement

- Observe performance of senior staff around their assigned winning priorities, department goals, personal development plans, and any high priority issues that may arise throughout the year by Date.
- Praise progress and provide positive feedback of senior staff during 1:1 meeting, in staff meetings, and in written communications by Date
- Inform senior management within Name of Company and Name of Company of the successes achieved by senior health plan staff as a means of fostering personal development by Date.
- Re-direct efforts of senior staff that are off-base confidentially when the action is observed or during our 1:1 session by Date.
- Solicit feedback and incorporate suggestions as a means of improving performance by Date.

B. To provide leadership

Develop relationships with senior leadership within Name of Company

- Discuss establishing a mentor within Name of Company to provide in establishing and furthering relationships with senior executives by January 1, Year.
- Establish monthly 1:1 meetings with Name of Company segment leaders that support health plan to manage matrix relationships and gain resolution to service problems. To include, but not limited to, Business Unit Names.
- Utilize the monthly Leadership Meetings to drive operational issues impacting the health plan by Date.
- Establish weekly 1:1 meetings with Manager that will provide him with information regarding on-going health plan operations by Date

Involve direct reports in strategic planning

- Establish annual meeting with senior staff to create health plan business plan and winning priorities by 3rd quarter of each budget year for the proceeding year
- To leverage the matrix relationships within Name of Company, include critical partners from other segments in business planning process
- Conduct quarterly off-site meetings with senior staff and determine progress of annual business plan, winning priorities and redirect if needed by March, Year
- Identify high priority issues for the health plan based on monthly performance and discussed in operational deep dive by Date

- Solicit feedback from Manager on monthly basis to ensure priorities are in line with corporate expectations

C. To ensure accountability

Establish consistent method to manage performance

- Provide clear direction with my direct reports during the 1:1 meetings on their performance around the winning priorities, department goals, individual development goals, and any high priority issues.
- Utilizing 1:1 meeting planning template, identify assigned winning priorities, goals, and issues and send out in advance of meeting
- Schedule consistent meetings dates and times each week with my direct reports to review progress and provide coaching and encouragement
- Meet in person with direct reports, and at a minimum of one time a month with those direct reports in other offices
- Solicit feedback from direct reports to make certain they understand their goals and issues.
- Document progress and next steps and provide meeting notes to direct reports at conclusion of meeting

Establish consistent method for direct reports to present department performance

- Provide opportunity for direct reports to report to peers and health plan leadership status on winning priorities, department goals, and other high priority issues
- Direct reports to present status of department performance once monthly during senior staff meeting and quarterly during all staff meetings.
- Utilize monthly all-staff newsletter for senior staff to communicate progress on winning priorities, department goals, and other high priority issues by Date.

III. LEAD ORGANIZATIONAL CHANGE

A. To improve communication

Establish more formal communication within health plan

- Develop a communication plan/schedule to be utilized by myself throughout the entire health plan by Date.
- The communication plan/schedule will incorporate all tools available to me including, but not limited to, the following;
 - 1:1 meetings with direct reports
 - Senior staff meetings
 - Monthly managers meetings
 - All-staff meetings
 - Monthly newsletter
 - E-mail communications
 - SharePoint

- Solicit feedback from senior staff on the effectiveness of communications within the health plan and incorporate suggestions into communication plan by Date

B. To provide leadership

Become responsive to my direct reports

- To fully expect the senior staff to be responsible, I must become responsive to their individual and group needs
- Fully embrace the servant leadership role and ask my senior staff daily how I can help them achieve their winning priorities, department goals, personal development plan, and any other high priorities by Date.
- Leveraging relationships within Name of Company and other segments, through my 1:1 meetings, help remove barriers to prevent them from accomplishing goals; to begin by Date
- Leveraging relationships within Name of Company and other segments, through my 1:1 meetings, help remove barriers to prevent them from accomplishing goals; to begin by Date
- Solicit input from the senior staff on the effectiveness of my responsiveness and incorporate suggestions by Date.

C. To ensure accountability

Drive to establish best practices within health plan and incorporate into Name of Company

- Based on our vision to be the best public sector health plan in the U.S., actively promote processes, outcomes, and accomplishments of the team within my peers and Name of Company leadership starting in January, Year.
- Generate opportunities to showcase outcomes of health plan through quarterly joint operating committee meetings with our customer, the State of State by Date

IV. DRIVE EMPLOYEE ENGAGEMENT

A. To improve communication

Conduct performance reviews in person

- During the annual performance review process, request that my direct reports complete a self evaluation based on their individually assigned winning priorities, department goals, personal development plan, and high priority issues.
- Upon completion, sit down individually with each direct report, and review their self-evaluation against the progress discussed during our 1:1 meetings

Based on those interactions, develop each individual's performance review and solicit to Manager for feedback; submit finalized evaluations to Name of Company for processing

- Schedule face-to-face meetings with each of my direct reports and present results of the annual performance reviews

B. To provide leadership

Establishment of development plan for each of my direct reports

- Annually, working with each of my direct reports, establish a career development plan that meets their needs and benefits the health plan and corporation as a whole.
- Obtain agreement on the individual development plan(s) from Manager by Date
- Quarterly, as part of my direct reports 1:1 meetings with me, assess progress of their developmental plans beginning Month, Year.

Become more visible in City and City offices

- Establish regularly visits to both offices on a monthly basis starting in Date
- Conduct all-staff meetings on-site between City, State and City on a quarterly basis beginning in Month, Year
- Conduct quarterly "Coffee with Leadership" meetings and invite staff to participate for hour long, informal session at each office location starting on Date

C. To ensure accountability

Establish more accountable environment

- During the scheduled 1:1 meetings with my direct reports, establish clear roles and responsibilities based on winning priorities by Date
- Based on winning priorities, develop department goals and personal development plan with each direct report by Date

V. PERSONAL WELLNESS PLAN

A. Work on emotional health

Embrace a principal of respect and openness

- Strive to develop numerous and rewarding friendships
- Maintain a positive and loving relationship with my children
- Display a positive demeanor, eliminate sarcastic comments
- Develop a stronger spiritual relationship, trust my faith in God for the greater reward
- Accept responsibility, reject passivity
- Be a positive role model

B. Work on physical health

Place priority on maintaining physical conditioning

- Maintain workout schedule of 5 days/week
- Monitor my blood levels; go for labs every month
- Eat healthy, eliminate fried foods.

C. Work on professional health

Establish a development plan to further professional growth

- Recognize that my career is based on God's plan
- Move to a position of greater responsibility within Name of Company 12 months
- Strive to become a Title of a company or a division of a company within 5 years
- Be compensated equal to industry level standards