



Personal / Career Planning Sheet

Skill Set	Action Items	Date
Personal Development		
Goals related to your own physical / mental wellness.	Exp: Engage in (at least) 30 minutes of exercise 4 /week	
	Exp: Calendar block bi-monthly massage	
Social		
Goals related to improving your relationships with colleagues.	Exp: Volunteer to be part of a company initiative or project that is not required	
	Exp: Bring bagels for breakfast on Friday "just because"	
Technical		
Goals related to improving your performance on the job.	Exp: Attend industry conference (reach out to other attendees in advance on LinkedIn)	
	Exp: Prioritize top five tasks / projects each day (rather than react to incoming email, etc.)	
Client Service		
Goals related to your ability to manage clients (both internal and external).	Exp: Send Friday update each week, i.e. quick, bulleted email of accomplishments, areas for input, and goals for the week ahead	
	Exp: Originate a new client or business opportunity with current client	
Team Development		
Goals related to your ability to get the best performance from others.	Exp: Timely performance evals of staff	
	Exp: Send debrief email w/ assignments after all project meetings	
Leadership		
Goals related to your ability to inspire others to get the best from themselves.	Exp: Serve / lead Board of regional nonprofit or national industry group	
	Exp: Serve as a mentor for an associate	

"The first step to getting somewhere is to decide you're not going to stay where you are." – John Pierpont Morgan