

12 MONTH ROADMAP FOR SUCCESS

OBJECTIVES

- Effectively transition leadership development from the external coach to the executive and his/her manager
- Specify the critical success factors required to meet the unit/function and position's goals over the next twelve months
- Build a system that identifies multiple sources of feedback and learning required to sustain on-going development

ELEMENTS

- Outline strategic initiatives for the role and unit and tie them to the overall strategy
- Develop plans for each initiative
- Identify barriers or obstacles that need to be addressed
- Tie to executive's leadership strengths and goals
- Outline the key developmental opportunities that require on-going development and the plans to address
- Get approval and buy-in from his/her manager for the plan
- Recruit advocates from team, peers and management to serve as feedback providers and coaches over the course of the year

ADVOCATES

- Advocates are key stakeholders and/or a mentor who can be trusted and is motivated to provide on-going feedback and suggestions for change
- Advocates are best at the 360 degree levels – direct reports, peers and manager(s)
- Recruit 4-5 advocates who agree to serve as feedback providers over the course of the year for your continued development
- Use the Feed Forward process to help advocates be most effective
- Approach advocates at least quarterly for suggestions and recommendations on improving leadership effectiveness

ELEMENTS OF THE 12 MONTH ROADMAP

- UNIT/FUNCTIONAL VISION (3-4 YEARS IN FUTURE)
- UNIT/FUNCTIONAL STRATEGIC INITIATIVES (NEXT 12 MONTHS)
- PERSONAL AND BUSINESS GOALS
- LEADERSHIP STRENGTHS TO LEVERAGE
- LEADERSHIP CHALLENGES AND OPPORTUNITIES
- ADVOCATES
- QUARTERLY CHECK-UP DATES

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Leadership Development Plan

Plan Created for:

Date Created:

Development Areas	Action Plan	Target Date

Strengths to Leverage	Action Plan	Target Date

Leadership Development Plan

Plan Created for:

Date Created:

Leadership Behaviors		
Stop	Start	Continue

Measures of Success	Source
1.	
2.	

Sample Leadership Development Plan

Plan Created for: Sam Smith

Date Created:6/1

Development Areas	Action Plan	Target Dates
Build more effective relationships with team members and peers.	<ol style="list-style-type: none"> Schedule time with CEO and key peers at least quarterly. Take the opportunity to learn more about them personally beyond the tasks at hand. Volunteer for assignments and tasks outside my area that allows me to work more closely with my peers. Become more self-aware of my reactions under stress and be sure not to discourage others from contributing their ideas. Increase my self-awareness of fairness to others. Build trust with Managers by delegating more responsibilities. 	<p>7/1</p> <p>9/1</p> <p>ASAP</p> <p>ASAP</p> <p>9/1</p>
Increase my team's skills and effectiveness through coaching and mentoring.	<ol style="list-style-type: none"> Assess my team's skills and experiences as part of the annual evaluations. Prepare a development plan for Manager A and Manager B with their input and interests. Meet with Manager A and Manager B monthly to discuss progress on the plans. Set up monthly meetings on important topics to teach my team and build their skills and knowledge. Start plan for management succession. Determine what I can delegate to my managers and others. Explain the rationale for changes in technical questions and edits. 	<p>9/1</p> <p>9/1</p> <p>Monthly starting 10/1</p> <p>10/1</p> <p>10/1</p> <p>9/1</p> <p>ASAP</p>
Improve my approachability so others will seek me out more often when needed.	<ol style="list-style-type: none"> Whenever I am in the hall keep my head up and make eye contact with everyone and give a smile and nod. Call them by name. Use positive non-verbal cues (nodding, eye contact, positive expressions, etc.) when talking with others. Become more aware of my non-verbals when frustrated with a 	<p>ASAP</p> <p>ASAP</p>

Sample Leadership Development Plan

Plan Created for: Sam Smith

Date Created: 6/1

	<p>team member. Try not to show my frustration.</p> <p>4. Solicit feedback from my team members quarterly about areas to improve my personal leadership and the department. Thank them for the feedback.</p> <p>5. Assess the audience before I criticize or provide feedback. Need to choose my words with certain people to</p>	<p>ASAP</p> <p>7/1</p> <p>ASAP</p>
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Leadership Behaviors

Stop	Start	Continue
Criticizing team members in public	Coaching more often	Building my team's skills
	Showing appreciation	Running great meetings
	Demonstrating empathy for others	Running a top-notch claims function

Measures of Success

Source

Measures of Success	Source
1. Noticeable changes in my leadership effectiveness.	CEO and key stakeholders.
2. Competency changes.	Re-survey 360 in 9 months.