



Career / Learning Plan

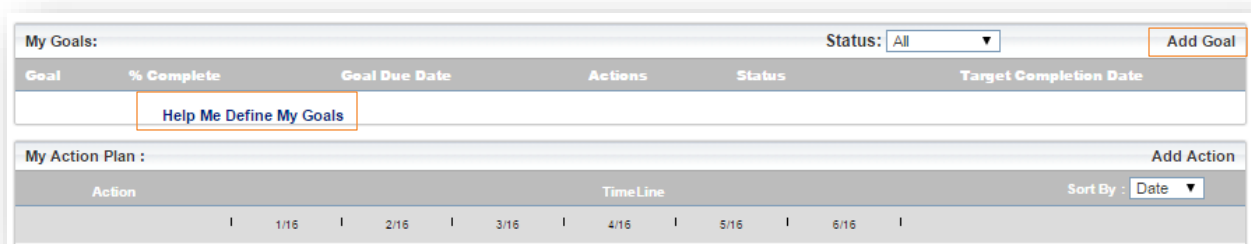
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What is the career/learning plan?

The career/learning plan is where you map out your goals and action plans. You can easily log what you are trying to accomplish, and the actions required to meet them, all in one place. By actively updating your plan, you are keeping yourself and your consultant/coach/mentor up to date with all the work being done to complete goals and keep everyone on track and accountable.

My Goals



The screenshot displays a web interface for managing goals and actions. The top section, titled "My Goals:", includes a "Status:" dropdown menu set to "All" and an "Add Goal" button. Below this is a table with columns for "Goal", "% Complete", "Goal Due Date", "Actions", "Status", and "Target Completion Date". A button labeled "Help Me Define My Goals" is positioned within the "Goal" column. The bottom section, titled "My Action Plan:", features an "Add Action" button and a "Sort By:" dropdown menu set to "Date". Below this is a timeline visualization with vertical markers for dates: 1/16, 2/16, 3/16, 4/16, 5/16, and 6/16.

The first section you will see is that of **My Goals**. This is where your goals are listed. If you are struggling to create a goal, there is a minor support clickable labeled “**Help Me Define My Goals**” which provides SMART goals. SMART goals are:

Specific, Measurable, Achievable, Realistic and Timely

Once a goal is decided, it is time to enter it in the system.

Adding Goals

Adding a goal is a simple process:

1. **Title the goal.** Be as specific as possible with the title so you will easily recognize the goal's main idea.
2. **Pick the competency 'experience' associated with the goal.**
3. **Pick a due date for the goal.** Make sure the goal due date is attainable and realistic.
4. **Fill in the details of the goal.** Only having a 300-character limit, describe your goal within two to three sentences. Keep it short and simple!
5. **Provide any additional notes for your goal.** Remember, the actions to your goal are not listed here. Those are in a separate section.

The 'Add Goal' form contains the following fields and options:

- Goal:** Text input field.
- Experience:** Dropdown menu with 'Adaptability/flexibility' selected.
- Created Date:** Date input field showing '8/7/2019'.
- Due Date:** Three dropdown menus for selecting month, day, and year.
- By:** Text input field showing 'Julie R'.
- Details:** Text area with a 'Characters Available: 300' indicator.
- Notes:** Text area with a 'Characters Available: 500' indicator.
- Save Goal:** A blue button at the bottom.

Once you are done, the goal will appear on your **My Goals** section.

Goal	% Complete	Goal Due Date	Actions	Status	Target Completion Date
Complete Professional Development Course	0	12/15/2016			

Below the table, there is a link: [Click here to add an action](#) and another link: [Help Me Define My Goals](#).

Next, we will create actions to help achieve the goal.

Creating an Action Plan

Now that a goal(s) has been created, you must add an action to support meeting the goal. You can select “**Add action**” within the goal section or scroll down to add the action in the action plan section. Make sure the action you are adding is being paired with the correct goal, by selecting the goal where it says “**Choose a goal.**” Actions are the criteria that help complete a goal.

Add Action

Choose a Goal: Aligning Expectations

Enter a keyword to get suggested resources for fulfilling your goal.

Keyword: []

Action Name: []

Date Action Created: 8/7/2019

How will this help me achieve my goals: []

Characters Available: 200

Start Date: August 7, 2019

Due Date: August 7, 2019

Details: []

Characters Available: 3000

Notes: []

Characters Available: 300

Status: In Progress

Save Action

1. **Give the action a name and describe how this will help you achieve your goal.** The character limit is small so do this in two to three sentences.

2. **Pick a start and end date.** Most actions should be finished prior to the goal end date, unless they are mutually inclusive.

3. Now, you can **add additional details and notes.**

4. Finally, **select the action’s status:**

a. **Not Started** – This means that you are not ready to act towards this goal

b. **In Progress** – You have or are about to begin work on this action

c. **On hold** – You were working on this action but must put it on hold

d. **Completed** – Your action is done

5. **Save your action.**

Make sure to update the status of your goals as you work through them.

NOTE: If you delete a goal, all actions associated with the goal are deleted as well. If you want to keep the actions created but not the goal, make sure to move the actions to a new goal. You can do this by editing the action and changing the goal up top.

Edit Action

Choose a Goal: Complete Professional Development Course

Action Method: Certification

Goal and action plan are set...now what?!

The goal and actions tied to the goal can be found together in the **My Goals** section. In the **My Action Plan** section, now that the action is set, a visual toolbar is created with a date timeline. As you get closer to the date, the chart bar will fill in. Remember goals and actions can be updated at any time.

The screenshot shows two main sections: 'My Goals' and 'My Action Plan'.

My Goals: This section has a 'Status' dropdown set to 'All' and an 'Add Goal' button. It contains a table with the following data:

Goal	% Complete	Goal Due Date	Actions	Status	Target Completion Date
Complete Professional Development Course	0	12/15/2016	Enroll in course	In Progress	1/20/2016

Below the table is a link: [Help Me Define My Goals](#).

My Action Plan: This section has an 'Add Action' button and a 'Sort By' dropdown set to 'Date'. It features a timeline from 1/16 to 6/16. The action 'Enroll in course' is shown as a vertical bar starting at 1/16. A 'View' button is located at the bottom right.

Once progress has been done for the goal, make sure to go back and edit the goal, updating your percent complete on the goal. Located in the **My Goals** section, select the goal you wish to update. It can be a great motivator to keep you on task to finish your goals!

The 'Edit Goal' form is titled 'Edit Goal' and contains the following fields:

- Goal: Complete Professional Development Course
- Percent Complete: 0 (dropdown menu)
- Created Date: 1/20/2016
- Due Date: December 15, 2016
- By: Matthew Heilman
- Details: This will help me with understanding my position better. (Character count: 244)
- Notes: (Character count: 500)

At the bottom are two buttons: 'Save Goal' and 'Delete Goal'.

All this information can also easily be found on the main dashboard page. By selecting your goal information there, it will take you to the plan page.

Remember...

Your goals and actions are only as good as you set them and your level of accountability. Pick something that is feasible to finish and enjoy completing your tasks to accomplish the goal!