Quick Start Guide

Development Plans

Development plans in symplr Performance provide a way to create detailed courses of action to help employees improve specific skillsets as well as their overall performance within your organization.

Anyone can create a development plan – employees, managers, and administrators – but for this guide we'll focus on the process as a manger creating a development plan for an employee.

Overview

Before getting into the details of the development plans, let's have a quick overview of the process as a whole.

1 **Create a development plan**. The initial step involves all of the set up for the development plan. This includes defining the overall objective and assigning coaches, adding necessary development opportunities that support the overall goal, and finally specific activities for the employee to perform.

2 **Review the plan**. Once created, the plan is sent out to the employee and any assigned coaches. They all receive a task in symplr Performance to review the plan and acknowledge its receipt.

3 **Update activities**. As progress is made on the specific activities and development opportunities in the plan, updates can be made to reflect the work performed. Employees can add notes and update the status of activities, while coaches and managers are able to edit any aspect of the plan.

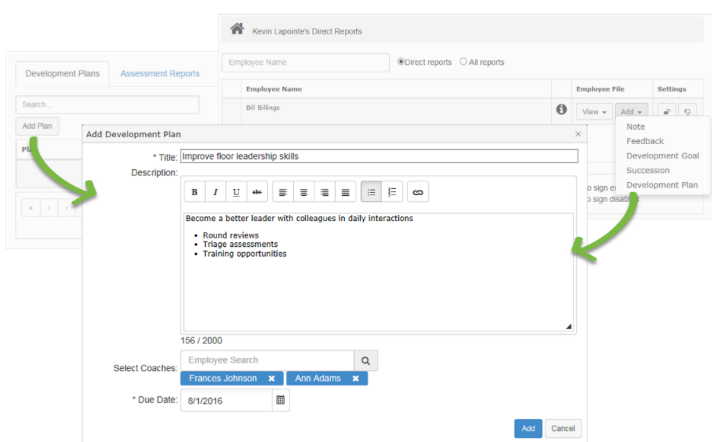
4 **Close the plan**. The employee took the plan to heart, diligently performed assigned activities, impressed coaches by improving in the development opportunities, and successfully completed the development plan. All that's left now is for the manager to close it out.

Create a development plan

Now that we've covered the general process, let's get into the details. The first main step is to create a development plan, which itself is comprised of a few steps.

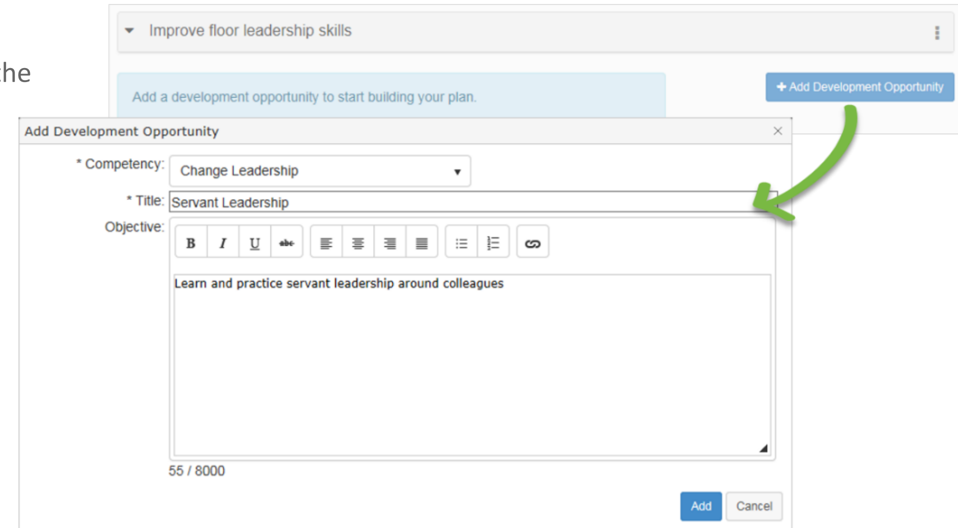
1 **Create a new plan**. Locate the desired employee from the *Employee List* page under the **Employees** area. From there you can jump right into creating a new plan by selecting the *Development Plan* option from the **Add** drop-down list.

(Alternatively, you can also navigate to the employee's *Development* page from the **View** drop-down list, then create a new plan by clicking the **Add Plan** button.)



Either method opens the *Add Development Plan* pop-up window with the development plan form. Complete the necessary fields and click **Add**. The saves the plan and opens the *Development Plan Details* page where you can add details for the plan.

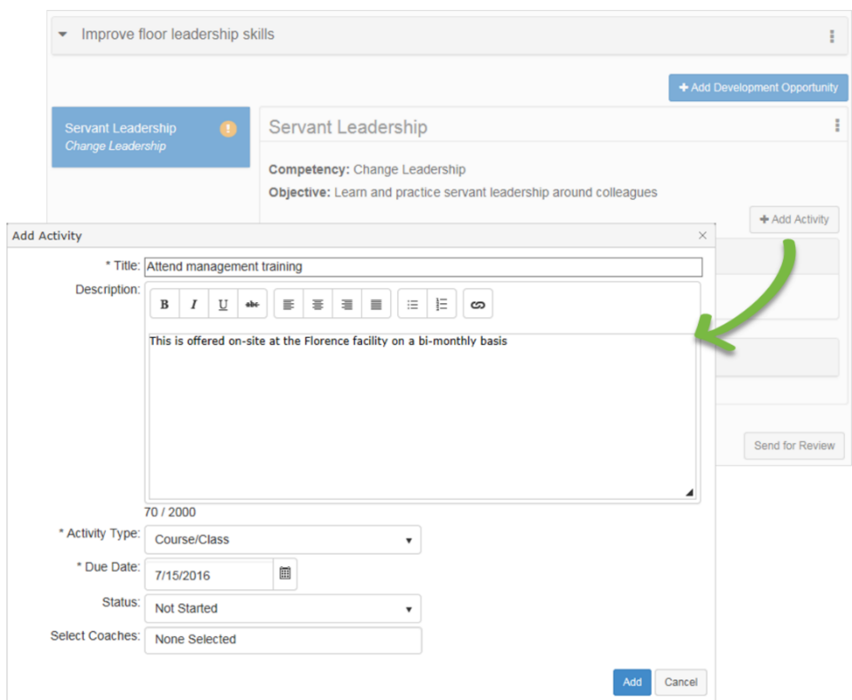
2 **Add Development Opportunities**. Next is to add development opportunities that support the overall goal of the plan. On the *Development Plan Detail* page, click the **Add Development Opportunity** button. This opens the *Add Development Opportunity* pop-up window with the form for collecting details about the development opportunity. Complete the form as needed and click the **Add** button.



Development plans can have as many development opportunities as necessary, so repeat this step until all the desired opportunities are added to the plan.

3 **Add Activities**. Final step in creating a plan is to add specific activities to each development opportunity in the plan. On the *Development Plan Details* page, select the desired development opportunity from the list on the left to load that opportunity's details.

In the detail area, click the **Add Activity** button. This opens the *Add Activity* pop-up window with the detail form for activities. Complete this form as necessary and click **Add**. The new activity now appears in the **Activities** area for the selected development opportunity.

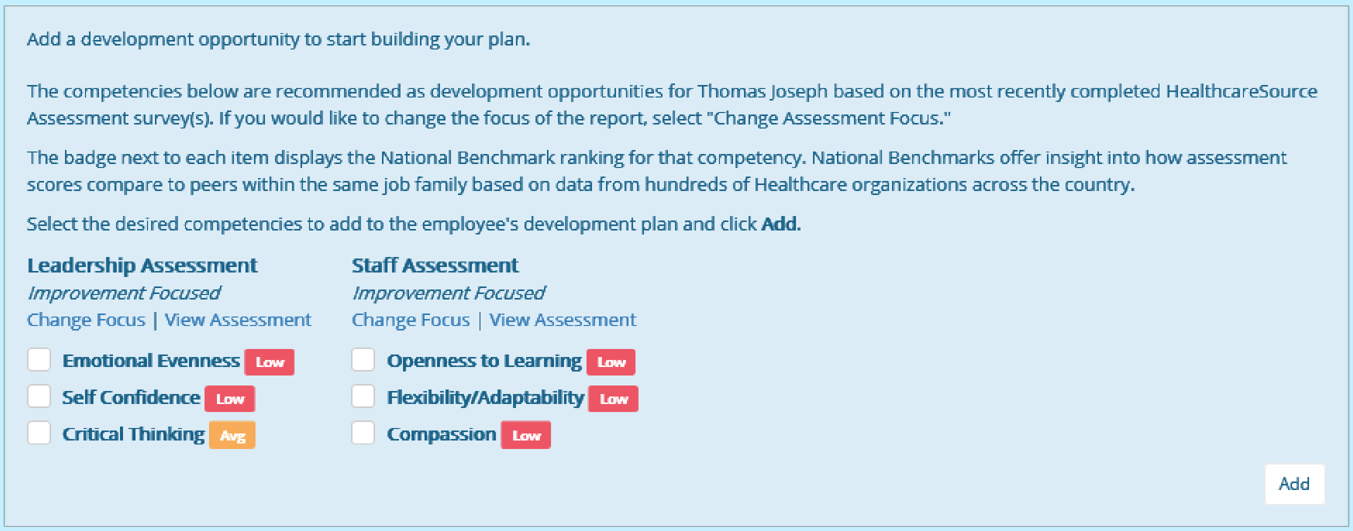


There's no limit to the number of activities a development opportunity can have, so repeat this until all desired activities are added to each opportunity for the plan.

symplr Assessments Integration

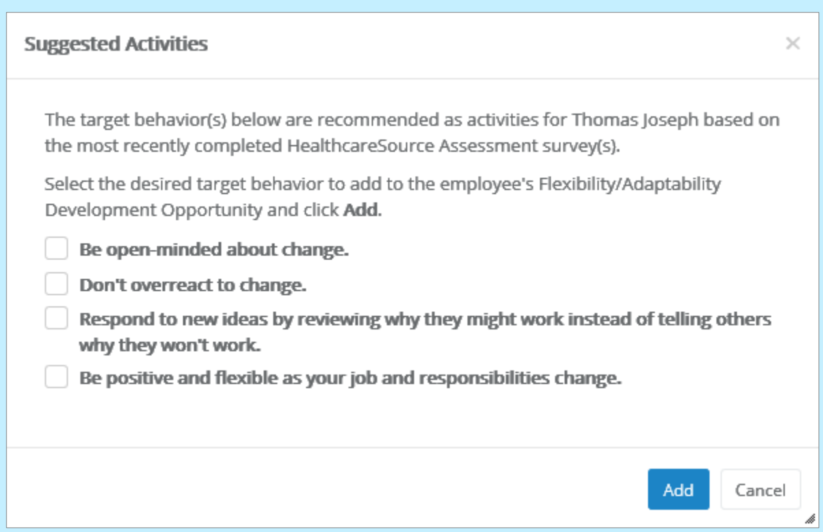
Does your organization have symplr Assessments integrated with symplr Performance? If so, your development plan creation process includes the option to automatically add recommended **Developmental Opportunities** and **Activities** based on the results of completed assessments.

When a new plan is created, you're immediately presented with a list of top three improvement-focused competencies from the employee's completed Leadership and Staff Assessments. You can select any or all of the three options and quickly add them to the plan.



These recommendations include a badge that shows how the employee ranks against the national averages for each competency. You can even change the focus of the assessment recommendations to select competencies that are strengths for the employee, or view a list of all competencies from the assessment.

Each recommended opportunity added to the plan also includes a list of suggested activities based on the competency. Since these activities are pulled directly from the assessment results, they're already tailored to support improvement of the developmental opportunity. Just check off the desired items and click **Add**, and your development plan automatically populates.



Just another way we're working to make it easier for you to develop talent within your organization!

Review the plan

Once all the necessary details have been added to the development plan (development opportunities and activities), it's time to send it off so employees and coaches can review and begin working on the plan.

This step is easy: just click the **Send for Review** button on the *Development Plan Detail* page. This updates the status of the plan from Pending to Open and sends a task to the employee and any coaches for the plan.

	Type	Task	Employee Name	Due Date	Department/Position Name
	Development Plan: Review Plan	Enrich Leadership Skills	Thomas Joseph	3/31/2017	HRIS Analyst I, Human Resources

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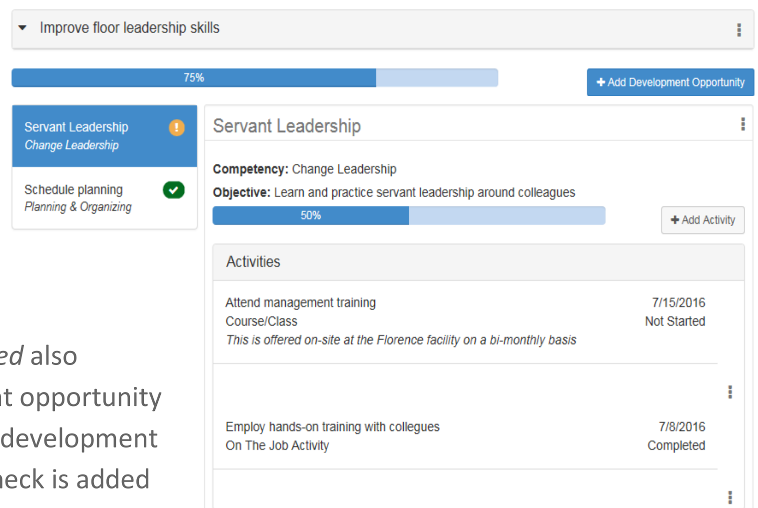
Displaying items 1 - 1 of 1

The **Review Plan** task for employees and coaches allows them to review the overall plan. Clicking the **Acknowledge Task** button closes the task and removes it from their task list. Further updates can still be made to the plan, however. Read on to find out how!

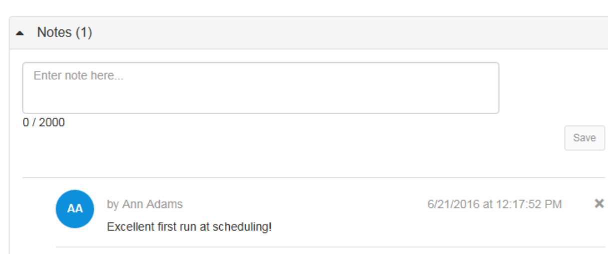
Update activities

Periodic updates should be made to the activities in a plan to help track progress. This mainly entails updating the **Status** of individual activities and adding **Notes** to development opportunities.



- **Update status**. Activities can be updated to reflect an employee's progress. Clicking on a specific activity opens the *Edit Activity* pop-up window that contains the same fields we saw when adding new activities. Locate the **Status** field, select the desired entry from the list, and click **Update**.

  Updating the status of an activity to *Completed* also updates the progress bar for the development opportunity and the overall plan. When all activities for a development opportunity are marked complete, a green check is added to that item in the **Development Opportunity** area.

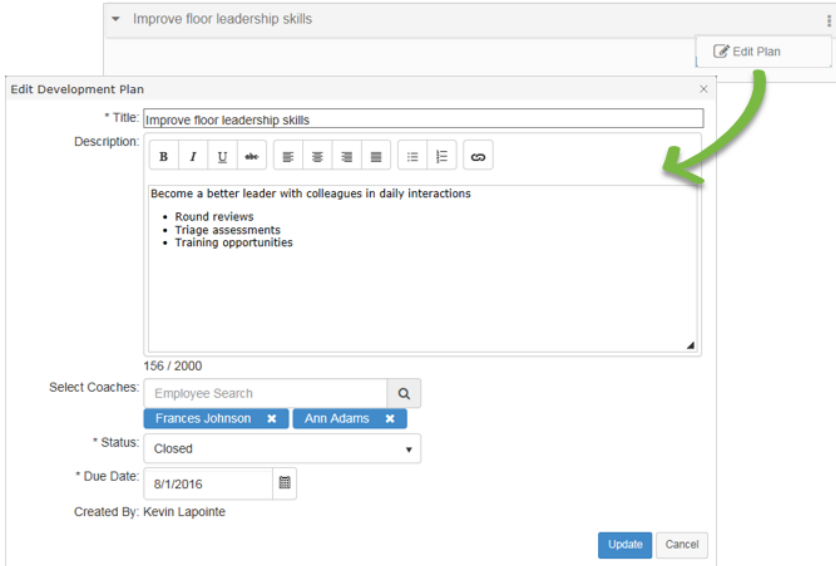


- **Add note**. Notes can be added to development opportunities in a plan, and anyone is able to add notes (employees, coaches, managers, and administrators).

  Expanding the development opportunity area for a development opportunity displays any notes previously added, along with a text field for adding a new note. Enter text into the field and click **Save** to add a new note.

Close the plan

After all the activities have been completed and the development opportunities addressed, the plan can be closed by the manager. That simply requires the manager to update the status of the overall plan, much like we did with the individual activities.



Click the menu icon in the far right side of the overall plan header and select **Edit Plan** from the drop-down menu to open the *Edit Development Plan* pop-up window. Select *Closed* from the Status drop-down list and click **Update**.

Closed plans are still viewable by all parties by visiting the *Development* page.

The Fine Print

Nothing sinister here, just a few things to keep in mind as you work your way through development plans.

- Coaches can be added to overall plans as well as individual activities.
- Coaches and managers are able to edit other aspects of the plan as well, such as adding/removing development opportunities and activities, and editing their content.
- When employees have multiple managers, development plan review tasks are sent to all managers.
- Notes can only be deleted by the person that created them.

