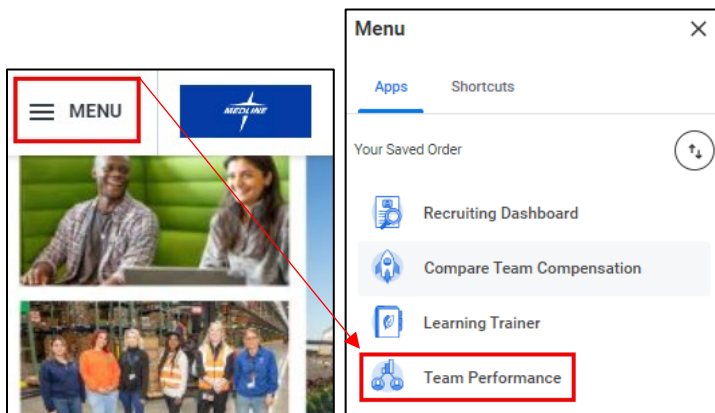


This guide shows managers how to create Development Plans for their employees.

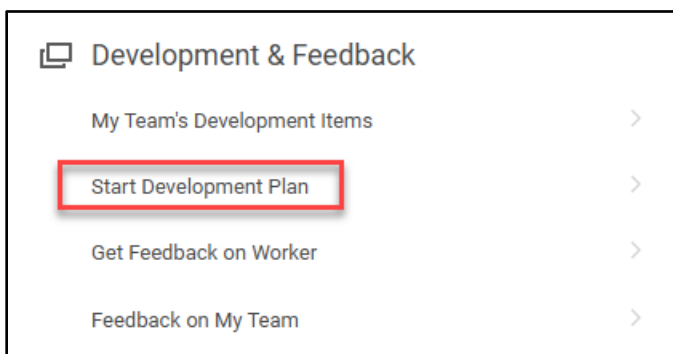
## Starting a Development Plan

A Development Plan can be started for an employee from the Team Performance application. Development Items can be created before or during the plan creation process.

To get started, click on the **Menu** icon in the top left-hand corner of your Workday Homepage. Then, select the **Team Performance**.



1. From the **Development & Feedback** menu on the right-hand side of the screen, select **Start Development Plan**.



2. Next, fill out the details of the Development Plan:

The screenshot shows a form titled "Start Development Plan for Employee" with a close button (X) in the top right corner. The form contains four required fields, each marked with a red asterisk (\*):

- Employee**: A search input field with the placeholder text "Search" and a dropdown menu icon.
- Review Template**: A dropdown menu.
- Period Start Date**: A date input field with the placeholder "MM/DD/YYYY" and a calendar icon.
- Period End Date**: A date input field with the placeholder "MM/DD/YYYY" and a calendar icon.

At the bottom of the form, there are two buttons: a "Cancel" button and a blue "Submit" button.

3. Click **Submit** when you have entered all the details for the Development Plan.

4. Employee will receive a task titled "Complete Employee Plan" in their **My Tasks Inbox**. They will need to review the help text and click **Get Started** to complete their self-review before submitting to the Manager for review.

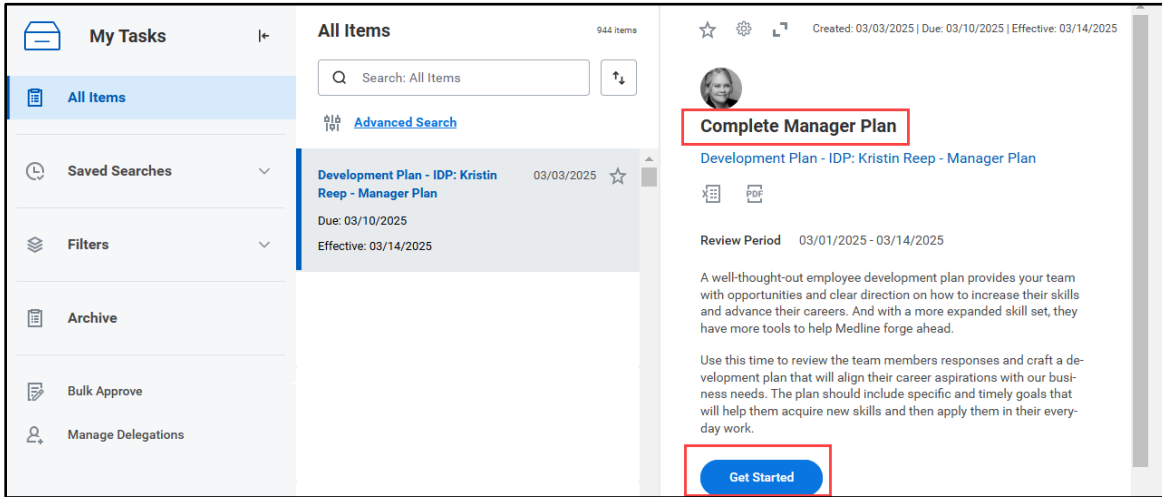
The screenshot displays a "My Tasks" inbox interface. On the left is a navigation sidebar with options: "All Items", "Saved Searches", "Filters", "Archive", "Bulk Approve", and "Manage Delegations". The main area shows a list of tasks under "All Items" (272 items total). A search bar is present above the list. One task is highlighted:

- Development Plan - IDP: Kristin Reep - Employee Plan** (03/03/2025)
- Due: 03/10/2025
- Effective: 03/14/2025

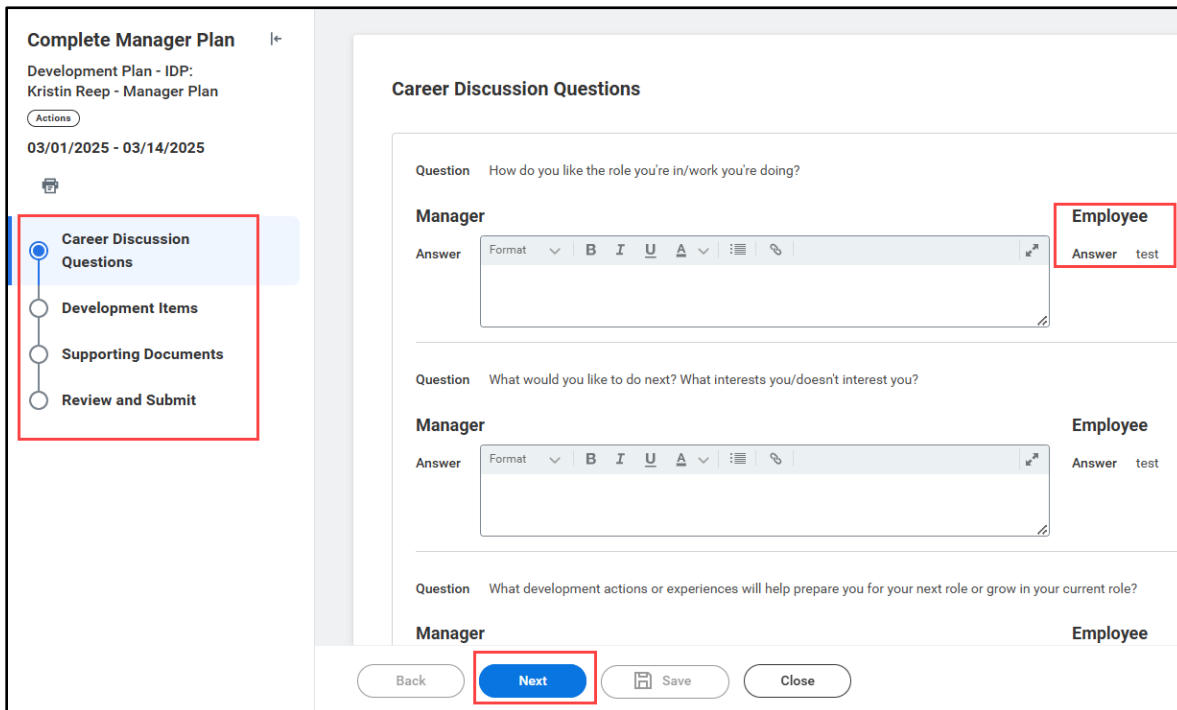
The task details are shown on the right side of the screen:

- Complete Employee Plan** (highlighted in a red box)
- Development Plan - IDP: Kristin Reep - Employee Plan
- Review Period: 03/01/2025 - 03/14/2025
- What is an Individual Development plan?**  
An Individual Development Plan (IDP) is essentially a planning document that identifies what your goals and objectives are for the upcoming year. We are continuously surrounded by opportunities to learn, grow, and improve. However, the most effective development plans are intentional and narrowly focused while aiming to balance both short- and long-term development priorities.
- To prepare:**
  - Make a list of development goals you would like to accomplish in the upcoming year.
  - Create specific objectives that will help you achieve your development goals.
  - Understand that sometimes it will take multiple actions to achieve your objectives.
  - Be deliberate about your choices to avoid getting sidetracked by projects that may not be in line with your goals.
  - Schedule dates to review your progress and ensure you are on track to meet your goals.
  - Consider scheduling a regular meeting with a mentor or your manager to discuss your progress and goals.
- Get Started** (highlighted in a red box)

- Once your employee submits the plan, you will receive a task titled “Complete Manager Plan” in your **My Tasks Inbox**. Click **Get Started** to review and add feedback or goals as needed.



- You can review your employee’s answers on the right-hand side. Clicking **Next** will walk you through the steps on the left-hand side.



- On the Development Items tab, additional Items can be added as needed. Click **Next** to add supporting documents. Click submit on the Review and Submit step once you are ready to have the meeting with your employee.

Complete Manager Plan | Development Plan - IDP: Kristin Reep - Manager Plan

03/01/2025 - 03/14/2025

Development Items

Development Item \* test

Additional Information

Status \* In Progress

Status Note

Start Date MM/DD/YYYY

Completion Date MM/DD/YYYY

Skills to Develop

History

Remove

Add

Back Next Save Close

- You will receive a task titled “Provide Manager Review Comments” in your **My Tasks Inbox**. This task prompts you to meet with your employee and should not be completed until after the meeting has occurred. Click the task to open its details on the right-hand side of the screen.
- Click **Get Started** after you have had the meeting with the employee.

My Tasks | All Items | 944 items

Created: 03/03/2025 | Due: 03/10/2025 | Effective: 03/14/2025

Provide Manager Review Comments | Development Plan - IDP: Kristin Reep - Manager Plan

Evaluated By Kristin Reep | Review Period 03/01/2025 - 03/14/2025

Please sit down with your employee to discuss the development plan with the following key points in mind:

**Be transparent about Career Development Opportunities**  
Provide constructive feedback on employee's goals and aspirations, and manage career expectations.

**Focus Employees on Experiences, not Positions**  
Encourage employees to identify experiences and capabilities they want/need to develop, and not just focus on a specific upward position.

**Communicate Future Organizational Capability Needs**  
Help employees understand the skills and experiences the organization is looking to build in the future.

**Help Employees Expand their Internal Networks**  
Help employees connect with peers, other managers, senior leaders and networks that match their area of career interest.

Get Started

10. Review the goals under the Summary section and click **Next** to **Submit the Acknowledgement**.

The screenshot shows the 'Provide Manager Review' form. On the left, the 'Comments' section is visible, showing the development plan title 'Development Plan - IDP: Kristin Reep - Manager Plan', the period '03/01/2025 - 03/14/2025', and the evaluator 'Evaluated By: Kristin Reep'. The 'Acknowledgement' section is active, featuring a 'Manager' dropdown menu with 'Status' selected, a text area for a 'Comment', and a 'Process History' section with a 'Submit' button highlighted in red. A 'Save for Later' button is also present.

11. The Development Plan can now be viewed on the employee profile under Performance.

The screenshot displays the employee profile for Kristin Reep, Sr Analyst HR Systems. The 'Performance' tab is selected and highlighted in red. The 'Development Plans' section is active, showing a table of development plans. The 'In Progress' section contains one item: 'Development Plan - IDP: Kristin Reep' with a status of 'Complete Employee Plan for Development Plan'. The 'Completed' section is also visible, containing one item: 'Development Plan - IDP: Kristin Reep'.

Review	Review Period Start Date	Review Period End Date	Status	Awaiting	Due Date	View Review	Create Review PDF
Development Plan - IDP: Kristin Reep	03/03/2025	03/03/2025	Complete Employee Plan for Development Plan	Kristin Reep	03/10/2025	View	Create New PDF

Review	Review Period Start Date	Review Period End Date	View Review	Create Review PDF
Development Plan - IDP: Kristin Reep	03/01/2025	03/14/2025	View	Create New PDF