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Talent4LIFE

# PERSONAL DEVELOPMENT PLAN GUIDELINE

## Imprint

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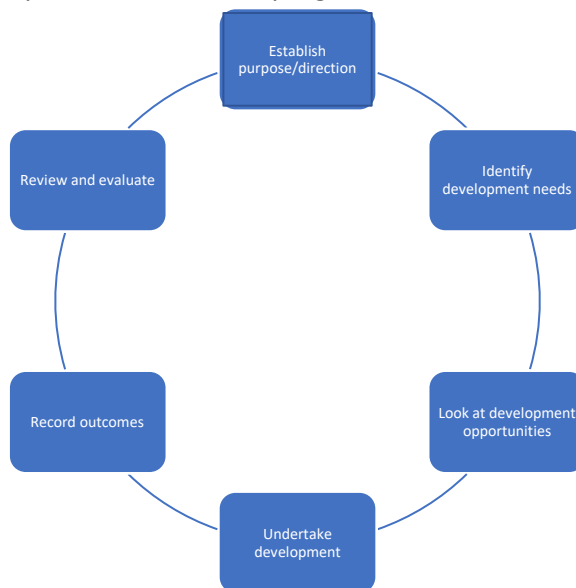
# 1

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## Guideline Introduction

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Developing your employees and their talents to the greatest benefit of the company is what you set out to do in every talk with them – especially in the annual appraisal talks. Nevertheless, results do not always follow through on what you set out to do and agreements are not specific enough to be actually executed. The Talent4LIFE Personal Development Plan (PDP) sets out to change this. It allows you to focus on the employees 45+ who have reached or are close to their peak performance and need new challenges and circumstances to continue to remain productive workers. Additionally, the tool ensures a development process for all generations to plan ahead and establish a strong workforce that adapts to the changes of the time and the overall needs of the company and the market. This generation management allows you to make use of all the talent in your company and to combine it in the most benefiting way. When used entirely it goes full circle as indicated in the model below.



The PDP is a thoroughly tested online tool that supports an employee appraisal or any other form of development talk between you as manager or HR personnel and the individual employee. You are guided through the process with information and tasks in worksheets. Include the PDP into your structures and routines to make the most of it.

This short guideline provides you with more information on the purpose of every worksheet and examples on how to use it. It complements the Talent4LIFE Handbook that offers a wider range of how-to- information, and background theory along the talent management cycle of Recruit - Onboard - Develop – Grow – Retain - Off Board and gives a detailed introduction to talent management. Before diving into the tool’s content, the topic of talent management is therefore introduced briefly.

## Talent and Talent Management

### **Definition of Talent in business context**

In the following, the conventional and the inclusive definition of talent and Talent Management are explained. The Talent4LIFE project is based on the inclusive definition.

### **Conventional definition**

Talent consists of a combination of two attributes: High performance and High potential. This only includes the best 3-10% of employees and presents a focus on key-positions: High performers, super keepers, etc. How can you identify, attract, hire, develop, and retain them? The key question is: What happens to the “other” 97%?

### **Inclusive definition of “talent”**

Business success depends on the performance of all employees. This means, every member of staff is important, and everyone has talent that can be of positive use in future actions. In this case talent is seen as potential for the ability to act (von Hehn 2016, p. 6). This talent model emphasises the importance of recruiting people that fit into the company and to find the best fit in terms of position/role.

### **What is Talent Management?**

**Conventional:** “Talent Management refers to those organisational concepts and measures that specifically deal with the recruitment, assessment, retention and development of current or future employees who are designated as talents because of their comparatively scarce, highly demanded key competencies that are crucial for the organisation.” (Ritz and Sinelli 2018, p.14, own translation)

**Inclusive:** “Talent Management System is an organisational approach that aims to make best use of the talent(s) of each member of staff to deal with current and upcoming challenges. It consists of three pillars: Strategy, Culture and HR-Processes.” (von Hehn 2016, p.3; own translation)

## Why is Talent Management important?

### Demographic change

- Aging workforce
- Shortage of potential workforce
- War for talents
- Retirement of baby-boomers
- Risk of loss of (tacit) knowledge
- Knowledge transfer
- Succession planning

### Pandemic as game changer

- Massive economic slump in many sectors
- Loss of jobs vs. “Great Resignation”
- Planning uncertainty
- Change in work models.
- Working location
- Distance learning
- Online meetings
- Cloud services
- Psychological and social effects

### Future work(force)

- New generations enter labour market.
- Majority of workforce is Gen. Y
- Generation Z starts.
- Generation Alpha enters in 5-10 years.
- Work in new jobs
- Values are changing.
- Technology more important
- Work-Life Balance surpasses career.
- Eco-Awareness

### Employees 45+

- Employees aged 45+ reach peak of development.
- “War for talent” is ongoing.
- Need for staff retention through active talent management and development within the company.

## How does the Personal Development Plan tie in with it?

The Personal Development Plan (PDP) is part of the Talent4LIFE project with the main aim to develop a model (including instruments) for talent management-based staff retention. It supports SMEs using talent management practices to become competitive, agile organisations to react faster to changing circumstances.

Other results of the project are:

- Explorative research study
- Talent4LIFE Model Handbook
- Green Paper for Sustainability and Policy Integration

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## Preparations before the use of the tool

### Data security

The Talent4LIFE Personal Development Plan (PDP) is a tool designed for HR related topics, essentially helping your employees to develop personally and thus supporting the company. To do so, it requires some employee related data. While this does not contain any personal data such as address, birthday, family status etc., the given information about their talents, work-life balance and goals can still be personal and allow inferences on them, thus they are considered worthy of protection for all employees. It is therefore important to be careful with the generated data and to secure it properly. The PDP itself does not save any data. Only the employee's name (a pseudonym is also possible) is used to match the results with the individual employee. When completing the tool, all data needs to be exported and saved locally on your or your employee's computer. For the repetition or update of the process, you can upload the data back into the tool. Since the download is in a JavaScript Object Notation (JSON) format, it cannot be read with most other programmes and is thus rather safe. Additionally, it can also be printed or saved in PDF format via the "Print"-button. However, when saving the data, make sure you apply all our internal data security regulations and save it somewhere that only you and the respective employee have access to. Before using the tool and thus saving data, get your employee's consent – at best in a written form. If they do not want you to save the downloaded data, you can offer to save it themselves, so all information stays with them.

Data protection guidelines in general as well as for HR related issues in particular in all partner countries follow the European GDPR restrictions and do not include any other stricter rules. If the same is true for all European countries, this should be checked before the use since the PDP deals with such personal data. Although HR data does not have to be encrypted before it is saved locally, we advise you to at least secure it with a password and only provide this to the employee themselves. Detailed information about where the data is stored and who has access to it as well as the right to forget shall not be infringed. If the employee wishes to have their data deleted, you are obliged by the GDPR regulations to do so, and no repercussions shall result for the employee.

The data gathered can be used for other, more elaborated, or statistical purposes such as setting up a general development plan for the entire company. If you use it for those purposes, be sure to inform the concerned employees. Consulting an internal data protection guide is always advisable.

### Personalise and prepare profiles

The PDP is designed for SMEs in Europe that have a basis for talent management (see "Introduction: Are you ready for talent management?" in the handbook). However, SMEs can vary in size, structure, strategy, and goals. Therefore, the tool is to some extent customisable and can be adapted to the individual needs of your company. You can thus exclude some items from the Personal Development

Evaluation if you make them not applicable. The same is true for the work-life balance measures. Since the tool does not save any personal data to comply with European GDPR regulations, you need to prepare it for your use. All changes you make to the pre-inserted content will remain as long as you stay in the same browser. You are therefore advised to prepare the tool for each position and then use it with all employees of that same position. When you open the PDP in another browser (e.g., Firefox, Microsoft Edge) you will again see the original version of the tool. A button called “remove all stored values” will delete all personal data after each use. It does not stay in the tool and has to be saved locally on your own computer.

To ensure the talents of the employee match the needs of the company, it is important to define the skills and competencies the role/position requires. If you have not yet defined the needed talents for a specific role/position, you should also do so before you start using the tool. It is not mandatory but makes the following steps – especially the core talents – easier. You can use this definition for all employees in that specific role/position. For support, please take a look at the Talent Assessment document:



## Talent Assessment

Talents should be defined and assessed to find the perfect match in terms of employee and role. The talent needs to be assessed in the individual work context. When knowing the talents available and the needs to fill, a faster allocation is possible – saving time and money. Talents can be detected and defined by imagining a perfect employee for the ever-changing labour market of today and tomorrow.

### Instructions:

Think about your company (or department if your company is bigger) in five years.

Where do you stand in relation to.

- Economic and societal changes?
- Globalisation and competition?
- Demographic changes?
- Digitalisation / Industry 4.0?
- Technical and structural innovations within the company?

**In five years' time, what will the company look like, which talents will you need to compete successfully in your business?**

**Think of a good employee in the company/department/role and define what they need.**

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**Now think of an ideal employee and update the list if necessary.**

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**Who are the right people for the job?**

With this list of needed talents, skills, and competencies, go back to your employees and match them with what they have to offer in Step 2 of the Personal Development Plan.

To support you in the definition of talents, the following list gives some possible talents and competencies. Needed talents for your employees can be a combination of technical and special skills with the option to customise them. They include personal skills, social, methodological, leadership and activity oriented and performance competencies. However, they depend on the branch, your company's goals, and the individual employee.

<b>Action orientation</b>	Targets and achieved results, overcomes obstacles, accepts responsibility, establishes standards and responsibilities, creates a results-oriented environment, and follows through on actions.
<b>Adaptability</b>	Adjusts quickly and easily to new things. Handles change well and often gets along with a variety of personalities and thrives in any environment. Can also remain calm in surprising situations.
<b>Analytical</b>	Has high ability to conduct research, sort data, swiftly process findings and come to a sound conclusion.
<b>Communications</b>	Communicates well, both orally and in writing. Effectively conveys and shares information and ideas with others. Listens carefully and understands relevant details in presented information.
<b>Creativity/innovation</b>	Generates novel ideas and develops or improves existing and new systems that challenge the status quo, takes risks, and encourages innovation.
<b>Critical judgement</b>	Possesses the ability to define issues and focus on achieving workable solutions. Consistently does the right thing by performing with reliability.
<b>Customer orientation</b>	Listens to customers, builds customer confidence, increases customer satisfaction, ensures that commitments are met, sets appropriate customer expectations, and responds to the customer needs.
<b>Dependability</b>	Can be relied on in any given situation. This can include anything from being punctual to keeping promises. Is highly valued and can be trusted with important tasks and duties.
<b>Emotional intelligence</b>	Possesses the capability for recognising, regulating, and constructively handling one's own emotions and the emotions of others.
<b>Interpersonal skill</b>	Effectively and productively engages with others through verbal and nonverbal behaviours and establishes trust, credibility, and confidence with others.
<b>Leadership</b>	Motivates, empowers, inspires, collaborates with, and encourages others. Develops a culture in which employees feel ownership in what they do and continually improve the business. Build consensus when appropriate. Focuses team members on common goals.
<b>Problem-solving</b>	Handles challenging or surprising situations. Can stay calm when encountering obstacles and assess all options to find the best solution.
<b>Organisation</b>	Organisation skills include the tidiness of the physical and digital spaces as well as the ability to plan, schedule and prioritise. Is time efficient, prevents miscommunications and improves overall efficiency.
<b>Self-confidence</b>	Believes in their abilities, actions, and decisions. Is likely to pursue ambitious goals, try new things and believe they can succeed.
<b>Teamwork</b>	Knows when and how to attract, develop, reward, and utilise teams to optimise results. Acts to build trust, inspire enthusiasm, encourage others,

	and help resolve conflicts and develop consensus in creating high-performance teams.
<b>Technical/functional expertise</b>	Demonstrates strong technical/functional proficiencies and knowledge in areas of expertise. Shows knowledge of company business and proficiency in the strategic and financial processes, including profit and loss (P&L) planning processes and their implications for the company.

Based on Berger & Berger, The Talent Management Handbook, Second Edition 2011 & LinkedIn Career Guide 2021

# 3

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## Megatrends influencing the development.

The megatrends of the coming years are coming at us like avalanches in slow motion. They will turn entire industries upside down and influence all areas of life. They last for several decades, unlike trends that only have an impact for a few years. Each megatrend has a formative influence on our society and the economy, and companies in particular should respond to them and adapt their strategies accordingly.

Four megatrends will be particularly important for companies in the near future. They are summarised here. Before you start the PDP with your employees, think of how you and your workforce will deal with them, if and which changes are needed and integrate it into your overall company strategy. The needs can vary between the different employee roles, so define them for each group. The strategy and definitions will then influence the needed talents that your employees and you can define in the course of the PDP. Make sure to address these megatrends and the needed development when communicating with your employees. This can be done in the context of the core talents as well as the work-life balance. When you introduce further demands, connect them to the overall strategy to make clear why it is needed. When the company develop the measures to deal with the megatrends, you can prevent many risks from affecting your business.

### Definition of Megatrends

#### The digital future

The digital transformation is in full swing. New technologies are now influencing all areas of social and economic life. They are changing the way we inform ourselves, how we communicate, how we consume and how we live. Any information can be accessed anytime, anywhere. This rapid progress offers fundamental advantages for companies. By quickly grasping global markets, they can better tailor products to customer needs and constantly adapt and optimise business models.

Companies that use data not only for marketing purposes but also for internal processes will emerge from situations such as the pandemic even stronger. It is essential to know which internal processes would be worth digitising and, above all, which data is required in which quality in order to be able to realise digitisation.

- Does your company plan to digitise internal processes/workflow in the next few years?
- How will digitalisation affect your individual job role?
- Will you need to change/adapt? If yes, what is needed from your side to keep up?

### Connectivity

We live in a network in which everyone is connected to everyone and everything, always and everywhere. This network society fundamentally changes the conditions for entrepreneurial success and demands new competencies from companies as well as individuals. Aspects such as basic human needs as well as cultural and social aspects are becoming increasingly relevant for business models and for the design of products and services. To fully exploit the potential of this megatrend, companies need a good understanding of digital transformation.

Companies and employees can benefit from this megatrend in various ways. For example, employees can work on projects from any location using cloud-based solutions and choose their place of residence independently of the company's location. At the same time, digital connectivity can reduce a company's process costs and thus increase efficiency.

- Does your company plan to change the way of working in the next five years?
- Are you as a company or personally prepared for distance learning (e-learning, online mentoring, coaching, evaluation)?
- Will you need to change/adapt? If yes, what is needed from your side to keep up?

### Demographics and social change

Changes in global demographics will bring significant challenges and opportunities for societies and businesses. The forces that underpin this megatrend include ageing populations in advanced economies and China, the outlook for future jobs, immigration pressure, skills imbalance, and the radically different priorities of younger generations.

Smarter machines are a solution for countries with shrinking labour forces; but they are likely to trigger challenges for younger economies, by disrupting jobs and limiting wage growth. Automation and greater use of tech will require tomorrow's workforce to develop new and more advanced skills. As the competition for highly skilled labour heats up, companies will need to spend more resources to attract, train and retain talent.

- How will automation affect job roles?
- Does your company have an employee retention plan in place for the next 5-10 years?
- Will you need to change/adapt? If yes, what is needed from your side to keep up?

### Neo-Ecology

The neo-ecology megatrend is establishing new values that reach into every area of our everyday lives. Environmental awareness and sustainability are increasingly evolving from an individual lifestyle to a social movement and a major economic factor. No other megatrend triggers such heated debates as the issue of sustainable consumption, resource conservation and energy supply. The neo-ecology of the future is geared towards the new way of consuming. It is becoming increasingly clear that the economy is undergoing a fundamental transformation: Instead of growth and profit maximisation, tomorrow's economy will focus on the intelligent and sustainable use of resources and on the comprehensive common good.

Companies must act. It will not only permeate the private sphere, but also increasingly the global economy. Only if companies prepare for this and identify the risks, they can successfully master the associated challenges.

- Is your company prepared to act green and sustainable?
- What do you think is the employees' role in this process?
- What is needed from your side to keep up?

# 4

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## Use of the Personal Development Plan (PDP)

The use of the tool is estimated to take about an hour, depending on how long you discuss individual aspects. It can be integrated into your appraisal talk structure and does not require all fields to be filled out. A progress bar at the top of the page will display how far you are moving along in the PDP.

When starting the tool, you will see an overview of the structure. It displays the four worksheets that are explained further below: 1. Personal Development Evaluation, 2. Core Talents, 3. Work-Life Balance and 4. Developments & Milestones. One employee appraisal talk equals one run through the tool. Therefore, insert the name of the respective employee on this first page. It will only appear on the downloaded and locally saved data to facilitate the attribution of the results to the employees. When all data is cleared at the end of the use, the name is deleted as well.

The PDP consist of the following four steps:



Behind each step is a worksheet to be filled out by you – the employer/HR and employee together. All steps build on each other to some extent but it is not mandatory to fill out every sheet or every field.

The worksheets contain a set of questions and respective fields to fill out (e.g., ratings, hitlists, desired measures). They will guide your employee and you through the appraisal talk, prompt discussion, and invite you to note down certain measures. Through including all worksheets in the set order, you enlarge your scope on talent development and thus retention.

In accordance with GDPR, the tool saves no inserted data. It is saved in the browser throughout the process, but deleted when the browser is closed. All content can be downloaded and saved locally on your own computer. For a later revision or a repetition of the process, you can upload the data into the tool.

**Result:** After going through the PDP the core talents, work-life balance measures, development goals and milestones to reach them are displayed for the individual employee. This is further supported by information on how to use this table and how to proceed from here.

### The steps of the PDP

The PDP is completed together with your employee in four steps. To give you a better understanding of what the input and measures could be, the following presents each step with a description and an example written in blue font colour. The exemplary employee is Margaret Miller with the following profile:



## MARGARET MILLER, 54

Production Manager in Carpentry

### PERSONAL BACKGROUND

She grew up as a carpenter's daughter and never wanted to work in any other sector. Building something with her hands is her passion and seeing this come to life on a big scale makes her happy. However, she always wants to advance the industry and to bring the company forward.

### SUCSESSES

- Vast know-how from custom-made products to large scale production
- Certificate in automated production
- Great network with colleagues and customers

### POSTITION IN THE COMPANY

In the company for 15 years, almost always in the same position. She has a lot of knowledge and personal interest in the industry. She really likes her job but is not sure if the company leaders see a future in her and her skills. While the company is changing, she has not quite found her place. There are challenges coming she does not feel a part of.

### JOB EXPERIENCE

#### Production Manager

December 2007 - now

#### Production Assistant

November 2000 - November 2007

#### Production Assistant

September 2019 - October 2000

### EDUCATION

#### GS Company Ltd.

VET degree as office administrator

### INTERESTS & HOBBIES

She is a creative soul who loves to built things with her own hands. Seeing a custom-made table that is perfect for the person is what makes her happy. She also reads a lot about interpersonal communication and architecture and design. In her free time she learned Italian and is now approaching French.

### 1. Personal Development Evaluation

The Talent4LIFE Personal Development Evaluation forms the beginning of the Personal Development Plan. Its purpose is to evaluate the employee's and the employer's perspective on certain characteristics and development potentials of the individual employee. Both parties shall rate the respective scalable questions (1 is the lowest, 5 the highest category) on their own and then combine them in the tool.

To do so, please refer to the Talent4LIFE handbook that presents the Personal Development Evaluation in its final chapter and also offers a wide range of advice along the cycle of talent management. Alternatively, you can use the following page in this guideline and distribute it to your employees before the set appraisal talk. Leave notes and comments in the provided area to be able to explain your rating to the other party if preparation is done some time before the actual meeting.

The questions and statements are based on the talent management cycle of Recruit – Onboard – Develop – Grow – Retain - Off-board that is presented more in detail by the chapters in the handbook. They shall all be used to address the full cycle. If, however, some questions are not fitting to your company or the role of the employee you are talking to, you can omit individual questions by giving it a 0 as rating. They will then not be included in the overall rating. The same is possible for the employee on their rating. Be sure to communicate it to them when handing out the form. When you meet with your employee for the development talk, combine both ratings in the online Personal Development Evaluation. The tool will automatically calculate the rating, resembling a traffic light system. Green questions mean you are well on track, no immediate change is needed. However, always keep an eye on these areas for them to remain this way. The amber categories are not of urgent concern, but should be carefully reflected on to turn them into green rather than red. The latter however are those categories that should be of the biggest concern to you and your employee and that require immediate action. If questions receive an entirely different rating from both parties (one gives a 1, the other a 5) the respective questions will be highlighted with a yellow frame around them. This indicates that the field needs special attention, and you should check if the same disagreement milestones appears with other employees as well which makes this a topic you need to address in the entire company.

Margaret receives the Personal Development Evaluation per E-Mail from her employer two weeks before the appraisal talk. She reflects on her work life and the relation to the employer and answers the related questions. Any items that are up for debate are commented on. Her employer does the same on their computer. When they meet, they exchange the rating and include both into the PDP under worksheet 1.

## 2. Core Talents

The results of the Personal Development Evaluation are displayed in the next step that deals with the employee's core talents. They are the basis for discussion as they show your focus areas where work needs to be done and where improvements are desired. Therefore, only the amber and red areas as well as any questions with severe disagreements are displayed. The idea is that the employee needs to develop or start using previously unused talents to fill these gaps.

The purpose of the second step on core talents is thus to form a basis for the individual Personal Development Plan (PDP). Based on the results of the Personal Development Evaluation, identify, and discuss the available and potential core talents of the employee together. Focus on the red and amber areas to see where the biggest obstacles and development potential lie. Always keep in mind the role of the employee and the needed talents for this. Examples of indicative talent/competencies/skills and how they can be described can be found in the document below. Based on the Personal Development Evaluation results and the talent needs in the company/department/role, discuss which talents are available, which are needed, and which can be developed to put the employee in a position to support the successful implementation of the company's business plan.



As preparation for the qualitative interview with the employee in this step, refer to the short guideline on how to conduct such an interview.

## Interview guideline for employers

### Preparation for interview

- Define purpose of interview: What do you want to get out of it? Be sure to communicate this to the employee you are interviewing
- Think of a logical flow of the interview, from a warm-up question to the more complex ones

#### What to ask for

- Behaviours
- Opinions/values
- Feelings
- Knowledge
- Background/demographics

#### The questions

- One at a time
- Clear, simple, easy, and short
- Open and inviting longer answers
- From simple to more complex/controversial
- From present to future
- Occasionally fact-based
- Ask employee to add

### Performing the interview

- Choose a setting with no distraction
- Address terms of confidentiality
- Explain format and estimated time of the interview
- Allow interviewee to clarify any doubts about the interview

### Your role as interviewer

As a successful interviewer you are:

1. *Knowledgeable*: Know the topic talent management and talent identification
2. *Structuring*: Structure and steer the procedure of the interview and keep the reins in hand
3. *Clear*: Ask simple, easy, short questions; no jargon
4. *Gentle*: Be tolerant, sensitive, and patient to provocative and unconventional opinions, let the employee finish, give them time to think, tolerate pauses
5. *Sensitive*: listen attentively to what is said and how it is said
6. *Open*: respond to what is important to interviewee and be flexible
7. *Critical*: challenge what is said, deal with inconsistencies in interviewees' replies
8. *Remembering*: relate what is said to what has previously been said
9. *Interpreting*: clarify and provide interpretation of what is said by the employee, but without imposing meaning on them
10. *Balanced*: do not talk too much, which may make the employee passive, and do not talk too little, which may result in the employee feeling like they are saying something wrong
11. *Ethically sensitive*: be sensitive to the ethical dimension and ensure answers are kept as confidential as possible

To facilitate the talent definition on the employee's side, provide them with the questions for talent definition and finding to help them analyse their own talents.

### Talent Assessment for Employees

Talents should be defined and assessed to match you to the perfect role in the company.

The talent needs to be assessed in your personal, individual work context.

When knowing your talents and the needs to fill, a faster allocation is possible – ensuring a better working environment.

Talents can be detected and defined by imagining a perfect work environment for the ever-changing labour market of today and tomorrow.

### A mix of talents and skills

To ensure you are well prepared for the needs of the future, you need a mix of hard skills (technical competencies, tailored to your business) and soft skills (personal and social competencies that enable you to adept to any given situation).

Examples can be:

These skills are just examples and have to be personalised for you individual situation. Think of your job now but also your personality, your talents in non-work-related contexts, your interests, and experiences in life.

## Name your talents and skills

### Instructions:

Think about your work in the company (or department if your company is bigger) in five years.

- Where do you personally stand in relation to..
  - Economic and societal changes?
  - Globalisation and competition?
  - Demographic changes?
  - Digitalisation / Industry 4.0?
  - Technical and structural innovations within the company?

**In this company in five years, which talents and skills do you have to compete successfully in your business?**

**Define what you have (your personality, your talents in non-work related contexts, your interests and experiences in life).**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Margaret receives the talent assessment for employees from her employer and takes some time to think about her talents, guided by the explanatory skills. She believes her vast knowledge about products from the large-scale production to the personalised pieces puts her in the position to take on a larger role in the production section. Her language skills in Italian and French also enable her to make international contacts. She thus comes to the appraisal talk with some ideas about her talents and matches these with the predefined needs and skills for the role as prepared by the employer beforehand. The latter has prepared him- or herself with the interview guideline and leads a qualitative interview. In the discussion with Margaret, they realise that she possesses a certificate in automated production and learns about her language skills, matching her with the soon to open position as International Production Manager for the large-scale factory in Italy. Together they then evaluate what other needed skills Margaret has and which ones she still needs.

### 3. Work-Life Balance

You want the employee to improve their performance and always give their best. They are inclined to do so and want to use all their previously defined core talents, but only when the workload and the circumstances do not influence on their personal life. Therefore, you need to address the work-life balance with them.

Work-life balance describes the balance of working with private issues. Both should be in a balance in order to live a well-balanced life. The definition from MBA Skool is that “Work life balance is a method

which helps employees of an organisation to balance their personal and professional lives. Work life balance encourages employees to divide their time on the basis of priorities [sic] and maintain a balance by devoting time to family, health, vacations etc. along with making a career, business travel etc. “(Work Life Balance Meaning, Importance, Steps & Example, 2021).

This is addressed in step 3 of the PDP where the employee rates their work-life balance in their current role on a scale from 1 to 5. This rating provides an initial overview about the general work-life balance of each individual. If you want to provide this for your employee prior to the talk since this is an individual activity, you can find the form here.

### Work-Life Balance Scale

Items	Rating
My personal life suffers because of work	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
My job makes personal life difficult	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
I neglect personal needs because of work	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
I put personal life on hold for work	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
I miss personal activities because of work	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
I struggle to juggle work and non-work	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
I am happy with the amount of time for non-work activities	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
My personal life drains me of energy for work	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
I am too tired to be effective at work	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
My work suffers because of my personal life	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
It is hard to work because of personal matters	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
My personal life gives me energy for my job	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
My job gives me energy to pursue personal activities	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
I have a better mood at work because of personal life	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree
I have a better mood because of my job	Totally agree <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> <input type="radio"/> do not agree

When the answers are inserted into the tool, it automatically calculates a rating indicating the overall satisfaction level of the employee with their personal work-life balance.

Afterwards you rate the areas that affect the work-life balance together with your employee. Rate each area according to whether it is in need of change for you personally and as a company (1=change needed; 5=no change needed). Both ratings will be combined similar to the one in the Personal Development Evaluation. If the rating result is green, there is no need for change, and you will not see the item again. If it is red, it is highly recommended to fill in the section. If it is rated amber, it is recommended to fill it in as well. Only those that received a negative rating will be displayed together with an explanation and suggested measures. Together go through each area where change is needed, discuss the options, and choose one measure from the list. Use the comment section to record ideas

and potential measures on how to improve the professional part of work-life balance in this section and thus enable a better work-life balance.

Keep in mind that the core talents can affect the work-life balance of employees differently. For example, if they lack skills in the field of digitalisation, they might need more support when working remotely. A summary of the measures you agree on is displayed at the end of the worksheet indicating the section topic, measures you selected and any comments you made.

Since not every company is able to provide the same measures of work-life balance, you can delete some of the sections if they are not applicable to your organisation. This way your employees and you can focus on the measures that are actually available. If you offer something that is not part of the list, you can include it at the bottom with the “add question” button. As your company evolves, more measures might come up. Therefore, the initial sections are listed below, so you can always reinsert them after you deleted them in your browser version.

## Work-Life Balance Questions

### Workload

#### Definition

The right level of workload is crucial for work-life balance satisfaction and health. Too high a workload can lead to burnout syndrome, too low a workload to burnout syndrome.

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#### Questions/ Answers

- Would you like to change your level of workload?
  - Work more.
  - Work less.

### Flexibility in the working time

#### Definition

Flexibility in working time means that an agreement between the employer and the employee upon modern, flexible working time can be made. Innovative working time models are for instance.

- **Flexible** working hours (the employee can decide for themselves when to work)
- the **4-days working week** (the same amount of working hours is distributed over a shorter period)
- **reduction in the quantity of working time** (for instance 50% or 75% working time)
- **honour system** (this is a model of work organisation, in which the completion of agreed tasks is in the foreground, not the temporal presence of the employee)

#### Questions/ Answers

- Would you like to change the current working time?
- If yes, which of the following innovative Working time models fits your needs?
  - Flexible working hours
  - 4 days-working week with same working time and full payment
  - Working time honour system

- Change of your working time: Which change (increase/decrease) fits into your interest?
- Others

### Flexible working models (location)

#### Definition

Flexible working models describe change especially in the fields where the employee can work. Flexible working locations include **home office** (= working from home); hybrid models to work part time at home and part time at work; Remote working models (= working in any other location than the office, which the employee can select); Working in Co-working spaces.

#### Questions/ Answers

- Would you like to change the working location possibilities?
- If yes, which of the following innovative Working models fits your needs?
  - Home office (full)
  - Hybrid model home office and company
  - Remote working models
  - Working in Co- Working spaces
  - Other

### Meals at work

#### Definition

The employer provides meals to employees during the work shift. The variety offered can include healthy snacks such as fruits & vegetables, vegetarian food, high quality regional food, etc.

#### Questions/ Answers

- Would you like to be offered meals or healthy snacks at work?
- If yes, which type of meals do you prefer?
  - Healthy snacks (fruits & vegetables)
  - High quality regional food
  - Vegetarian
  - Vegan
  - Warm dishes
  - Others

### Childcare

#### Definition

On-site childcare benefits (nursery, kindergarten, afternoon care) at the company are significant for the employee and employer alike. When an employer offers this, it shows employees that they are valuable and deserve the convenience of availing an on-site childcare facility. For workers with children, adequate childcare is necessary to enable a good working environment. This offers a medium for great motivation amongst employees and in turn, boosts the growth of the business as well.

### Questions/ Answers

- Would you like to have childcare offers on-site?
- If yes, which type of childcare offers do you prefer?
  - Nursery half-day
  - Nursery full day
  - Kindergarten half-day
  - Kindergarten full day
  - Afternoon care
  - Others

### Sport and health promoting measures.

#### Definition

Sport and health promoting measures describe the offer of companies where employees can participate in organised sport activities (running club, cycling group, etc.) or the company sponsors activities in sport offers (gym, yoga-course, etc.). Also, the offer of health-promoting programs belongs to this sector (Lectures, health days, occupational safety, prophylaxis measures, consultation times with the company doctor).

### Questions/ Answers

- Would you like to have sport and health promoting offers?
- If yes, which type of offers do you prefer?
  - Running club
  - Cycling group
  - Company gym
  - Sponsoring sport activities
  - Health promoting programs.
  - Others

### Support for Cultural activities

#### Definition

This sector describes the sponsoring/organisation of employer activities which are related to cultural activities or other offers for the leisure time.

### Questions/ Answers

- Would you like to have cultural or other leisure offers?
- If yes, which type do you prefer?
  - Cultural activities
    - If yes, which one?
  - Leisure activities
    - If yes, which one?
  - Sponsoring of cultural and leisure activities
  - Others

Margaret receives the Work-Life Balance Scale before the appraisal talk to prepare and think about her Work-Life Balance. She brings her selection to the meeting, where she inserts it into the tool and receives a rating which is rather positive. Overall, she is satisfied with the balance between her work and private life. To find out where improvements can be made, she then rates the areas that affect the Work-Life Balance together with her employer. They already know the process from the Personal Development Evaluation and soon know which areas need improvement. The options and potential measures that accompany the general definition in the PDP are discussed by the two and personal measures and ideas are left in the comments. This includes workload where Margaret wants to work more and notes down in the comments that she is looking for an extension of her responsibilities, the working location with co-working spaces for outside inspiration and the support for cultural activities where she wants to join further language classes or even an exchange programme. Margaret keeps taking a look at her core talents – especially the ones she wants to develop – when rating the areas. This way she ensures that the planned progress does not affect her Work-Life Balance negatively.

#### 4. Developments and Milestones

Once you have defined the core talents and the work-life balance together, you start setting actual development goals. This is done in step 4 of the Personal Development Plan. The purpose of this step is to define and explain the necessary steps to reach the development goals and to highlight what tools or activities you can use for making this step easier.

To reach an agreement on actionable steps, the SMART methodology is used to reach an agreement through setting clear objectives, reflecting on them and breaking them down in a simple and effective way.

The SMART method for the PDP allows to clearly define professional objectives such as, *“I would like to be promoted”*, *“I would like to receive this specific training on this topic...”* However, you also need to consider the focus areas of the employee’s work-life balance needs from the previous step. Those are displayed at the top of the page. They have to be considered to ensure the development steps can actually be executed.

The following structure is used for setting the goals of the Personal Development Plan:

S	M	A	R	T
Specific	Measurable	Achievable	Relevant	Timely
What?	How much?	How?	Why?	When?

**S:** Accurate description of the objectives that the employees have for their development in the company and also for their work-life balance. They should have a clear and concise goal that they can set themselves to. When setting a goal together, be specific about what you want to achieve. The more specific your description, the greater the possibility of complying with it.

**M:** Provide a metric or number to identify when the objective has been achieved. This will help you to know if the proposed objective is achieved or if you are not reaching what you have set as a goal. When measuring an objective, you can compare it with the planning or with the objective and decide in case of deviations or variations what corrective measures you are going to take.



**A:** The objective must be challenging but also achievable. Easy objectives and those objectives impossible to reach are not great motivators. For a goal to be achievable, you have to weigh the effort, time, and other costs your goal incur against the gains and the other obligations and priorities you have in life.

**R:** The objective must be relevant for the employee and for the company. To make your goal relevant, make sure it is worth both parties' time, that achieving it will provide positive benefits to them, and that this goal aligns at least to some extent with the other goals that the employee has in their professional and personal life.

**T:** Set the time expected to achieve the goal. Anyone can set goals, but if you don't have a timetable with set dates, it will likely not be successful.

The answer to each of these items is inserted into a table, thus clearly defining, and detailing all the goals you set together with your employee. Fill in the SMART table with the specific objectives, how their achievement is measured, the reason for why it is achievable and relevant and the time it takes. If you are unsure how to answer some items, the following questions can guide you further:

### Guideline questions for complete SMART table

#### **SPECIFIC**

- Who is involved?
- What do we want to achieve?
- What are the conditions and limitations?
- What steps need to be taken to achieve it?
- Which skills do I need to develop?

#### **MEASURABLE**

- How will we measure the worker's progress?
- Which numbers quantify the goal and make it measurable?

#### **ACHIEVABLE**

- Is my objective something I/my team can reasonably accomplish?
- What restraints might be in the way?

#### **RELEVANT**

- Why do I set the goal?
- Why do I want to achieve this goal?
- Is this goal related to the employee's and/or the company's overall success?

#### **TIME**

- What's your time horizon?
- When will you start creating and implementing the tasks you have identified?
- When will you finish?

After completion of the SMART table with your goals, sort the agreed measures in the following table using the drag-and-drop method according to their timeframe and priority. For longer developments you can also plan ahead for the next few years and review the plans at a set date. Each development goal has three corresponding fields for KPIs, milestones and a review date that should be filled in at this point to make the goal yet more specific and to know when and how progress is tracked.

Key Performance Indicators (KPIs) are the elements within the plan that help you and your employee elaborate what you want to achieve and by when. They are short statements that are quantifiable and outcome-based and are used to measure whether the employee is on track to meet their set goal. You should set KPIs and milestones with your employee to determine the monitoring progress, how often it will be assessed, and what key milestones should be watched for.

To be successful with KPIs, consider the SMART model (Specific, Measurable, Achievable, Relevant, and Time-Bound) again. Together with your employee, elaborate the KPIs for each goal determined by answering the following questions:

- What is the desired goal?
- Why does this goal matter?
- What metrics are you using to measure progress towards the goal?
- How often are you measuring progress?
- How will you know when you have reached your desired goal?

Afterwards set milestones for each goal that you use to measure the employee's progress in achieving a goal. Based on the specific goal, milestones can be defined as:

- Performance results
- Skills development
- Completion of certain tasks

Depending on the objective of the goal, the milestones vary. At this point it is important to break down the goals into individual steps on the way to completion. Set the milestones together with your employee to tighten the metrics and clarify standards so the two of you can confidently work towards the goals. Lastly, set a review date for when you will meet again to check the progress made. Once a plan has been set and practices have been determined, ensure you and your employee allow for a sufficient amount of time for making progress.

Remember: It is easy to underestimate how long things take. Do not get too ambitious with scheduling, but rather set realistic expectations. Guide your employee to prioritise following the schedule you have created together and encourage them to commit to finding time to achieve the milestones and goals. So, a crucial question for you and your employee to consider in each step is: How much time can I reasonably commit to this step in my personal development plan? Questions to consider when developing a proactive plan:

- What is the general timeframe available?

- When shall what be achieved?
- When will we meet again to discuss progress?
- How can both sides control progress?

Margaret and her employer want to turn the previous results into actionable steps. They therefore specify and define the goals in detail using the SMART method. For Margaret one of the goals is to have more responsibility. She specifies this as such:

Agreed development	S	M	A	R	T
Have more responsibility	Lead an international team	With at least two colleagues, active in 2 countries	Start with being active in one country	Introducing our products abroad opens new markets and revenue	Start setting up in Q4 2022, have the team established end of 2023

Margaret and her employer further define the goal as follows:

Development goals	KPI	Milestone	Review Date
Have more responsibility	Establish and lead an international team. Introduce the products abroad	Have two additional colleagues work on international issues. Be fully active in another country	Review team structure end of Q4 2022. Review established team at Q1 2024

## Result

After you have completed all steps, the results tables summarise all your input and agreements: your employee's core talents, their work-life balance, and your combined goals, KPIs, milestones and review dates.

This data shows your employee their individual talents and gives you a good estimation of the positions they are able to take in the future. Reflect together on what you can do to make more of the employee's talents available to the company and use them to further prosperity as well as the satisfaction level of both the employee and thus the employer.

The work-life balance measure shows where adaptations might be needed to make the work more enjoyable or in the case of difficulties (e.g., taking care of family members or work overload) where changes can lead to a more productive workforce. Keep the comments in mind and make changes where feasible. It is also advisable to compare the wishes of different employees to find the most desired measures and start with them if possible.

Finally, the specific development goals offer a place to start and with their KPIs and milestones a concrete way to go. Focus on the most important goals to the both of you and take the necessary steps

to reach your milestones and achieve the KPIs. The review dates are your times to reflect on the progress together and make changes if necessary. This can be either another appraisal talk where you use the PDP again or a shorter check-up meeting to evaluate the progress and stay on track. These results can be used for reflection at any time and be revisited during the next talk. Just upload the saved data again or print and physically save this page using the print button.