

INDIVIDUAL PROFESSIONAL DEVELOPMENT PLAN WORKSHEET

Use this to create a professional development plan for yourself or someone on your team. The more accurately you answer the questions, the more useful your professional development plan will be.

Date completed:

OBSERVE

What subjects am I dealing with every day?
What subjects am I dealing with a few times a week (but not every day)?
What subjects am I dealing with a few times a month?
What subjects am I only dealing with rarely (just a few times a year)?

I like it, I'm pretty good at it, and I use it a lot, but not every day.
I like it, I'm not as good at it, and I use it a lot, maybe every day.
I don't like it, I'm not very good at it, and I use it a lot.
I like it, and I'm not at all good at it.
I don't like it, and I'm not at all good at it.

ASSESS

How comfortable are you answering coverage questions about _____?
How much time do you spend working in _____?

<p>How many clients do you have with _____?</p> <p>How long have you had your P&C license?</p> <p>How long have you had your life & health license?</p> <p>Rate the following lines of business from the one you enjoy most to the one you enjoy the least.</p> <p>**These are example self-assessment questions.</p>	
Assessment type/result	
Assessment type/result	
Assessment type/result	
Assessment type/result	

GOALS

Daily learning goals	
Weekly learning goals	
Required learning goals	
CE goals	
Big learning goals	
Short term goals	
Long term goals	
Scary goals	

BUILD THE PLAN

List the business/professional podcasts you plan to subscribe to and listen to on a regular basis.	
List the newsletters and news services you plan to subscribe to and/or read on a regular basis.	
How many CE credits do you have now?	
When are your required CE hours due?	
When is your next ethics update due?	
List any upcoming carrier mandated training.	
What designation(s) are you working on now?	
What designation(s) need an update in the next year?	

REVIEW

Next review due (30 days)	
Next annual review due	

WHAT'S NEXT?

Where do you want to be in a year?	
Where do you want to be in five years?	
What else do you need to get there?	