

IDP User guide – With Template

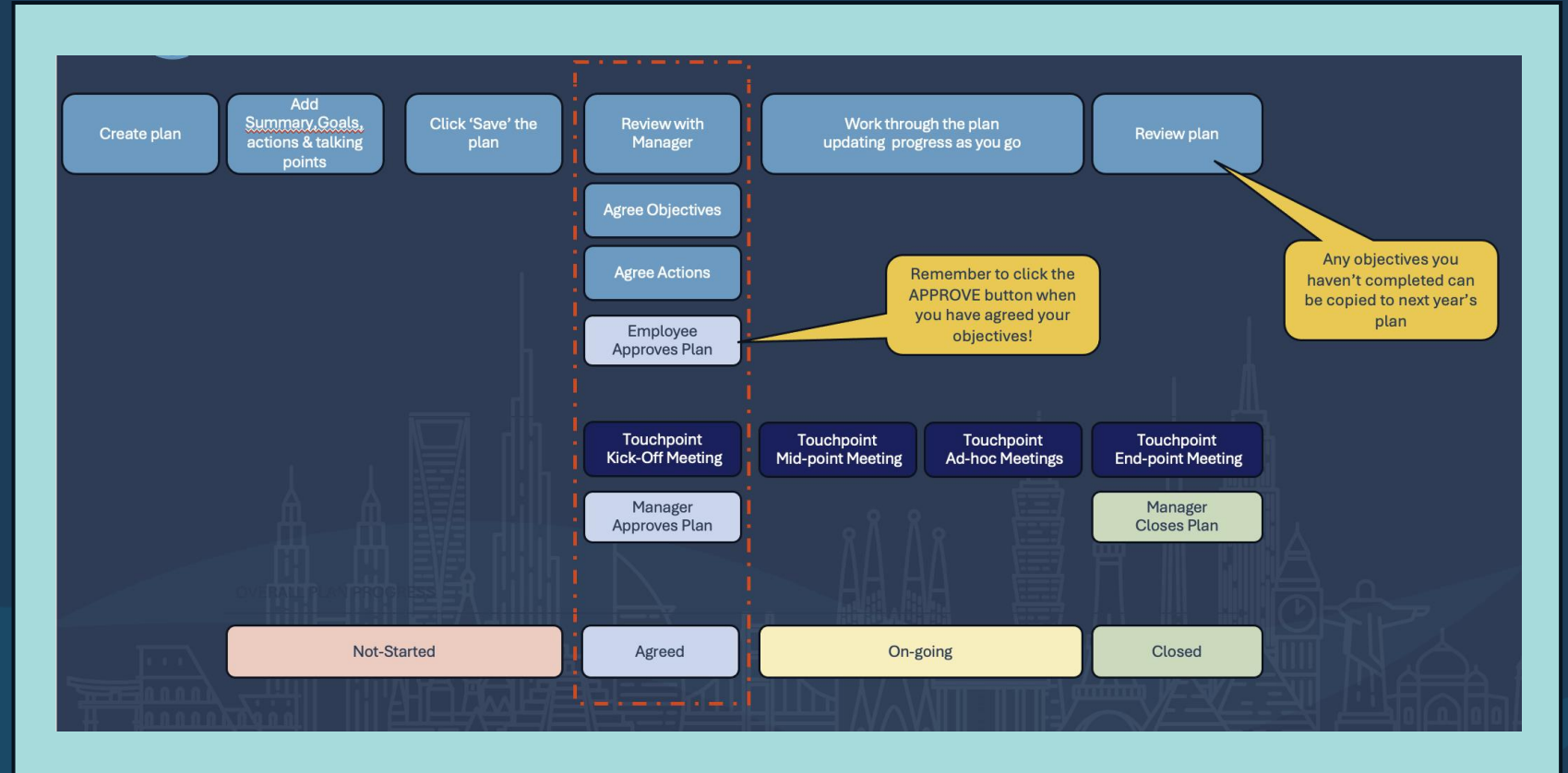
IDP – Individual Development Plan with Template

The IDP workflow allows for the creation of the plan to be built, add or personalise goals, actions and talking points and for the Employee to 'approve'

Once objectives and actions are agreed in your review, the Manager 'approves' the Plan, from their profile and you approve from Employee profile

The Status will move from 'Not started' to 'Agreed'. As updates are made the status moves to 'on-going', at the end of year/plan the Manager closes the Plan to move it to 'closed' status

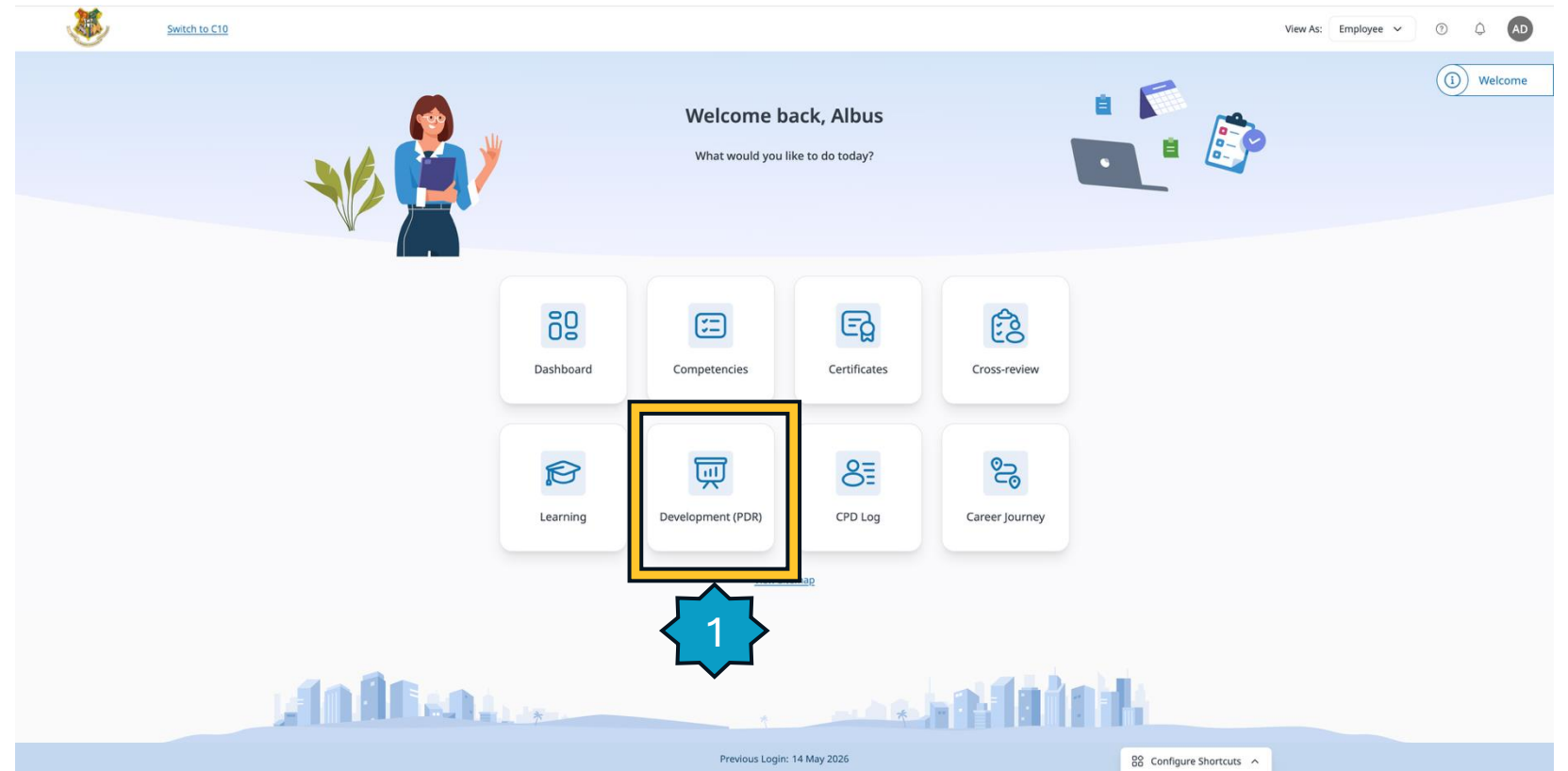
You can copy any objectives from a closed plan to a new/live plan if you wish for the following year



Completing a development plan

1

Select the Development Tile from your welcome page



Completing a development plan

1

Your IDP has been loaded to your profile by your organisation

2

Here you will see the plan and timelines

3

The red reminder bar remains until you have completed, saved and approved your plan

The screenshot displays the 'Development (PDR)' interface. At the top, a blue header bar contains the title 'Development (PDR)' and a subtitle 'This area is where you can create and edit your plans, objectives, and actions to improve your competency.' A red reminder bar spans the width of the page, stating 'Please remember to approve the agreed plan' and 'Not yet Approved by manager | Approve plan as employee'. Below this, a yellow box highlights the 'Individual Development Plan 2026' section, which includes a timeline from January 2025 to May 2027. The timeline shows several key events: '7 Jan 2026: Kick-off Meeting', '3 Apr 2026: Quarterly Review', '3 Jul 2026: Quarterly Review', '2 Oct 2026: Quarterly Review', and '18 Dec 2026: End-Point Review'. A yellow box also highlights the 'Talking Points' section, which lists several objectives with progress indicators (green circles). The interface includes a sidebar with navigation links for Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR), CPD Log, Career journey, Portfolio, CV, and a folder icon. The bottom right corner shows 'Previous Login: 14 May 2026'.

2



Completing a development plan

1

Select 'Touchpoints' to open the right-hand panel

2

Here you can adjust the date, add comments and documents

3

Click 'Save'

The screenshot displays a web application for managing development plans. On the left is a sidebar with navigation links: Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR), CPD Log, Career journey, Portfolio, CV, and a folder icon. The main area shows a timeline starting from December 2025. A yellow box labeled '1' highlights the 'Touchpoints' section in the left sidebar. A 'Touchpoint' modal is open on the right, labeled '2'. It contains fields for 'Start Date' (7 Jan 2026), 'Template' (Touchpoint | Kick-Off Meeting), and 'Touchpoint' (Kick-off Meeting). At the bottom of the modal are buttons for 'Comment', 'Document', 'Save', and 'Delete'. The 'Save' button is highlighted with a yellow box labeled '3'. The background shows a timeline with various milestones and tasks, including 'Kick-off Meeting', 'Quarterly Review', and 'End-Point Review'.

2

3



Completing a development plan

1 Add a comment opens this view

2 Use the free text box to add your comment, 'Submit' will turn blue when text is entered

3 Your comment will appear below with a date stamp of when the comment was made once 'Submit' has been clicked

**Comments cannot be added to once submitted*

The screenshot shows a web application for managing a development plan. The main area displays a timeline from December 2025 to December 2026. On the left, a sidebar lists navigation options: Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR), CPD Log, Career journey, Portfolio, and CV. The 'Development (PDR)' section is active, showing a list of 'Plan Items' with progress indicators (green circles) and due dates. The items include 'Talking Points', 'Touchpoints', 'Kick-off Meeting' (7 Jan 2026), 'Quarterly Review' (3 Apr 2026, 3 Jul 2026, 2 Oct 2026), 'End-Point Review', and several tasks like 'Identify a core technical skill...', 'Register for a specific certification...', 'Audit a recurring workflow...', 'Create a "Current State" flowchart...', 'Lead a cross-functional initiative...', and 'Volunteer to lead a "Post-Mortem" or project review session.'.

Three numbered callouts highlight the comment functionality:

- 1** Points to the 'Comments/ Evidence (1)' button at the top of the 'Kick-off Meeting' item.
- 2** Points to the 'Comment' input box with the placeholder text 'Post a new comment here...' and a 'Submit' button.
- 3** Points to the displayed comment by 'Albus Dumbledore' dated '3 Jun 2026', which includes the text 'Add comments from meeting here'.

At the bottom right, it says 'Previous Login: 14 May 2026'.



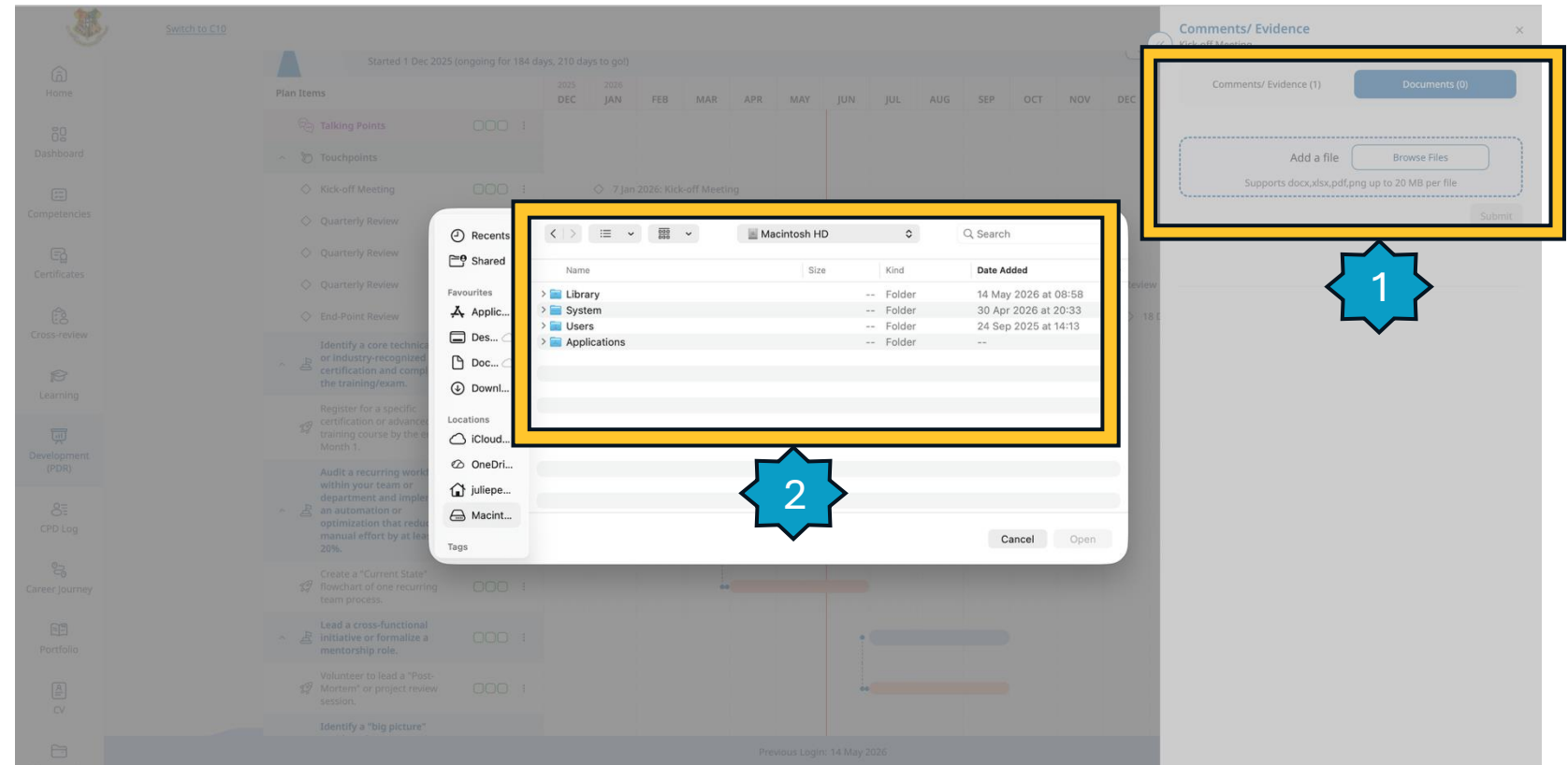
Completing a development plan

1

Click Documents And then 'Browse files'

2

The File search box will appear, once document has been found and selected the 'open' will turn blue, click to upload



Completing a development plan

1

A confirmation box will appear

2

A date stamped uploaded document will show in the right-hand panel

The screenshot displays a web application interface for managing a development plan. On the left is a sidebar with navigation icons for Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR), CPD Log, Career Journey, Portfolio, CV, and a folder icon. The main area features a 'Plan Items' table with columns for months from December 2025 to December 2026. The table lists various tasks such as 'Kick-off Meeting', 'Quarterly Review', and 'End-Point Review', each with a progress indicator (three circles). A modal dialog box is centered on the screen, titled 'Uploaded Completed!', with a green checkmark icon. The text inside the dialog states: 'You have successfully uploaded the documents to Competency: Kick-off Meeting. It should now reflect on your document log.' Below this text is a blue 'Continue' button. To the right of the main area is a 'Comments/ Evidence' panel for the 'Kick-off Meeting'. It has tabs for 'Comments/ Evidence (1)' and 'Documents (1)'. Under the 'Documents (1)' tab, there is a section for 'Add a file' with a 'Browse Files' button and a note: 'Supports docx,xlsx,pdf, png up to 20 MB per file'. Below this, a document entry is shown: 'Customer Communication 2026 (2).pdf 3 MB'. A date stamp '3 Jun 2026' is visible next to the document name. The bottom of the screen shows a 'Previous Login: 14 May 2026' timestamp.

Switch to C10

Started 1 Dec 2025 (ongoing for 184 days, 210 days to go!)

Plan Items

	2025 DEC	2026 JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Talking Points													
Touchpoints													
Kick-off Meeting		7 Jan 2026: Kick-off Meeting											
Quarterly Review							3 Apr 2026: Quarterly Review						
Quarterly Review													
Quarterly Review													
End-Point Review													
Identify a core technical skill or industry-recognized certification and complete the training/exam.													
Register for a specific certification or advanced training course by the end of Month 1.													
Audit a recurring workflow within your team or department and implement an automation or optimization that reduces manual effort by at least 15-20%.													
Create a "Current State" flowchart of one recurring team process.													
Lead a cross-functional initiative or formalize a mentorship role.													
Volunteer to lead a "Post-Mortem" or project review session.													
Identify a "big picture"													

Uploaded Completed!

You have successfully uploaded the documents to Competency: Kick-off Meeting. It should now reflect on your document log

Continue

Comments/ Evidence

Kick-off Meeting

Comments/ Evidence (1) Documents (1)

Add a file Browse Files

Supports docx,xlsx,pdf, png up to 20 MB per file

Submit

AD Albus Dumbledore 3 Jun 2026

Customer Communication 2026 (2).pdf 3 MB

Previous Login: 14 May 2026



Completing a development plan

1

Click on the Objective title

2

You can alter the dates using the calendar icons

3

Click 'save' once completed

The screenshot shows a web application for creating a development plan. The main interface has a sidebar on the left with navigation links: Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR), CPD Log, Career Journey, Portfolio, CV, and a folder icon. The main content area is titled 'Switch to C10' and shows a timeline from December 2025 to December 2026. A list of 'Plan Items' is on the left, including 'Talking Points', 'Touchpoints', and various reviews. A specific item, 'Identify a core technical skill or industry-recognized certification and complete the training/exam.', is highlighted with a yellow box and a blue star icon labeled '1'. To the right, a modal window titled 'Objective' is open, showing 'Objective Details' and 'Competency Gaps'. It includes a 'Status' section with progress indicators, 'Start Date' (5 Jun 2026), and 'End Date' (31 Mar 2026). A calendar is displayed over the modal, with the date 5 highlighted. A blue star icon labeled '2' is positioned above the modal. At the bottom of the modal, a 'Save' button is highlighted with a yellow box and a blue star icon labeled '3'. The bottom of the main interface shows 'Previous Login: 14 May 2026'.

3



Completing a development plan

1

Status of the objective can be updated by ticking the required box

2

Use the free text box to add a description

3

Click 'Save'

The screenshot shows a web application for creating a development plan. On the left is a sidebar with navigation links: Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR), CPD Log, Career journey, Portfolio, CV, and a folder icon. The main area is a calendar view starting from December 2025. A list of 'Plan Items' is on the left, including 'Talking Points', 'Touchpoints', 'Kick-off Meeting', 'Quarterly Review', 'End-Point Review', and several specific tasks like 'Identify a core technical skill...', 'Register for a specific certification...', 'Audit a recurring workflow...', 'Create a "Current State" flowchart...', 'Lead a cross-functional initiative...', 'Volunteer to lead a "Post-Mortem" or project review session.', and 'Identify a "big picture"'. Each item has a status indicator (three circles) and a timeline bar. On the right, a modal window titled 'Objective' is open, showing 'Individual Development Plan 2026'. It has two tabs: 'Objective Details' and 'Competency Gaps'. Under 'Objective Details', there's a 'Status' section with 'Objective Progress' and three radio buttons: 'Agreed' (selected), 'Ongoing', and 'Done'. Below this are 'Start Date' (5 Jun 2026) and 'End Date' (5 Jan 2027) fields, and an 'Objective Type' dropdown set to 'Technical Mastery and Certification'. A large text area for 'Objective description' contains the text 'Identify a core technical skill or industry-recognized certification and cc' and 'Add description here'. At the bottom of the modal is a blue 'Save' button. Callout 1 points to the status radio buttons, callout 2 points to the description text area, and callout 3 points to the 'Save' button.

Switch to C10

Started 1 Dec 2025 (ongoing for 184 days, 210 days to go)

Plan Items

Talking Points

Touchpoints

Kick-off Meeting

Quarterly Review

Quarterly Review

Quarterly Review

End-Point Review

Identify a core technical skill or industry-recognized certification and complete the training/exam.

Register for a specific certification or advanced training course by the end of Month 1.

Audit a recurring workflow within your team or department and implement an automation or optimization that reduces manual effort by at least 15-20%.

Create a "Current State" flowchart of one recurring team process.

Lead a cross-functional initiative or formalize a mentorship role.

Volunteer to lead a "Post-Mortem" or project review session.

Identify a "big picture"

Objective

Individual Development Plan 2026

Objective Details

Competency Gaps

Status

Objective Progress

Agreed Ongoing Done

Start Date *

5 Jun 2026

End Date *

5 Jan 2027

Objective Type

Technical Mastery and Certification

Identify a core technical skill or industry-recognized certification and cc

Objective description

Add description here

Save

Comment

Document

Previous Login: 14 May 2026

1

2

3



Completing a development plan

1

You can use these tick boxes to update the status of individual activities

2

Or open up the plan progress from the plan name

3

'Save progress' highlights in Blue when changes are made. Click to save your updates

The screenshot displays a web application for managing development plans. On the left is a sidebar with navigation links: Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR), CPD Log, Career journey, Portfolio, CV, and a folder icon. The main area shows a 'Touchpoints' list with activities like 'Kick-off Meeting', 'Quarterly Review', and 'End-Point Review', each with three status boxes (Agreed, Ongoing, Done). A yellow box highlights the status boxes for the 'Audit a recurring workflow' activity. To the right, a 'Plan Progress' modal is open for the 'Individual Development Plan 2026'. It shows a 'Plan Done / Sign-off' section with approval checkboxes, followed by a table of activities with their status boxes. The 'Audit a recurring workflow' activity is highlighted with a yellow box, and its status boxes are also highlighted. At the bottom of the modal is a 'Save Progress' button. A blue starburst with the number '3' is positioned next to the 'Save Progress' button.

Switch to C10

Touchpoints

- Kick-off Meeting
- Quarterly Review
- Quarterly Review
- Quarterly Review
- End-Point Review

Audit a recurring workflow within your team or department and implement an automation or optimization that reduces manual effort by at least 20%.

Create a "Current State" flowchart of one recurring team process.

Identify a core technical or industry-recognized certification and complete the training/exam.

Register for a specific certification or advanced training course by the end of Month 1.

Lead a cross-functional initiative or formalize a mentorship role.

Volunteer to lead a "Post-Mortem" or project review session.

Identify a "big picture" problem the company is facing and draft a formal proposal or strategic roadmap to address it.

Schedule a 20-minute "Discovery Coffee" with a manager from a different department.

7 Jan 2026: Kick-off Meeting

3 Apr 2026: Quarterly Review

3 Jul 2026: Quarterly Review

2 Oct 2026: Quarterly Review

Previous Login: 14 May 2026

Plan Progress

Individual Development Plan 2026

Plan Done / Sign-off

Approved by Manager

Approved by Employee

Development

Individual Development Plan 2026

Talking Points

- Kick-off Meeting
- Quarterly Review
- Quarterly Review
- Quarterly Review
- End-Point Review

Audit a recurring workflow within your team or department and implement an automation or optimization that reduces manual effort by at least 15-20%.

Create a "Current State" flowchart of one recurring team process.

Identify a core technical skill or industry-recognized certification and complete the training/exam.

Register for a specific certification or advanced training course by the end of Month 1.

Lead a cross-functional initiative

Save Progress



Completing a development plan

1

You can click 'View Competency' and the right-hand panel will appear

2

Data from your current Assessment area(s), where a gap between current indicator and Job Level Requirement was identified will be listed. This assists you in building in an objective or action to close the gap into your IDP

The screenshot displays the 'Development (PDR)' interface. On the left is a sidebar with navigation options: Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR) (highlighted), CPD Log, Career Journey, Portfolio, CV, and a folder icon. The main content area is titled 'Development (PDR)' and includes a 'Switch to C10' link. Below this is a 'Create/edit plan' section with a vertical timeline of steps: 1. Overview and Timeline, 2. Talking Points, 3. Objectives and Actions (highlighted with a blue circle), 4. Touchpoints, and 5. Review and Approve. To the right of the timeline are sections for 'Add objectives to your plan' and 'Add Actions to your Plan'. A 'View Competency' button is highlighted with a yellow box and a blue starburst labeled '1'. On the far right, a 'View Competency Gaps' panel is shown, featuring a '75% Compliance' gauge and a 'Gap Analysis Summary' table. The table lists 'Advanced PHP' with 'Current' status 'K', 'JR' status 'S', and 'Job Readiness' status 'A'. A yellow box and a blue starburst labeled '3' highlight the 'Gap Analysis Summary' table.

Development (PDR)

This area is where you can create and edit your plans, objectives, and actions to improve your competency.

References: View History View Competency

Create/edit plan

Overview and Timeline
Describe your plan and general timeline

Talking Points
Talking points to be discussed as part of the plan

Objectives and Actions
Add objectives and actions to your plan now or do it later

Touchpoints
Review dates and touchpoints for your plan

Review and Approve
See a summary of your plan

Delete Plan

Previous Login: 8 Jun 2026

View Competency Gaps
IDP 2027

Current
Advanced skills
Fun Job Roles

75% Compliance

Gap Analysis Summary
Your competency level vs job requirement

Competency	Current	JR	Job Readiness
Advanced PHP	K	S	A

3



Completing a development plan

1

Progress of Meetings, objectives and Actions can quickly be Ticked (Whilst in the meeting or after)

2

Click 'Save Progress'

The screenshot displays a web application for managing development plans. On the left is a sidebar with navigation links: Home, Dashboard, Competencies, Certificates, Cross-review, Learning, Development (PDR), CPD Log, Career Journey, Portfolio, CV, and a folder icon. The main area is titled 'Switch to C10' and shows a list of 'Touchpoints' with checkboxes for 'Agreed', 'Ongoing', and 'Done'. A timeline view shows various meetings and reviews with progress bars. On the right, a 'Plan Progress' modal is open, showing a 'Plan Done / Sign-off' section with checkboxes for 'Approved by Manager' and 'Approved by Employee'. Below this is a table of development activities with checkboxes for 'Agreed', 'Ongoing', and 'Done'. A 'Save Progress' button is highlighted at the bottom of the modal.

Development	Agreed	Ongoing	Done
Talking Points	☒	☐	☐
Kick-off Meeting	☒	☐	☐
Quarterly Review	☐	☐	☐
Quarterly Review	☐	☐	☐
Quarterly Review	☐	☐	☐
End-Point Review	☐	☐	☐
Audit a recurring workflow within your team or department and implement an automation or optimization that reduces manual effort by at least 15-20%.	☒	☐	☐
Create a "Current State" flowchart of one recurring team process.	☒	☐	☐
Identify a core technical skill or industry-recognized certification and complete the training/exam.	☒	☐	☐
Register for a specific certification or advanced training course by the end of Month 1.	☒	☐	☐
Lead a cross-functional initiative or formalize a mentorship role.	☐	☐	☐
Volunteer to lead a "Post-Mortem" or project review session.	☐	☐	☐
Identify a "big picture" problem the company is facing and draft a formal proposal or strategic roadmap to address it.	☐	☐	☐
Schedule a 20-minute "Discovery Coffee" with a lead from a different department.	☐	☐	☐

2

1



Completing a development plan

1

Once the kick off meeting with your line manager has been completed and objectives have been discussed and updates made

2

Click 'Approve plan as employee'

The screenshot displays the 'Development (PDR)' interface. At the top, a navigation bar includes a 'Switch to C10' link, a 'View As: Employee' dropdown, and a user profile icon. Below this, a blue header bar reads 'Development (PDR)' with a '+ Create a new Plan' button. A prominent pink banner across the top of the main content area contains the text 'Please remember to approve the agreed plan' and a button labeled 'Approve plan as employee' with a checkmark icon. This button is highlighted with a blue star and the number '2'. The main content area shows the 'Individual Development Plan 2026' for the period 'Started 1 Dec 2025 (ongoing for 184 days, 210 days to go)'. It features a calendar view with monthly tabs for 2026 and 2027. A sidebar on the left lists various development activities, including 'Talking Points', 'Touchpoints', 'Kick-off Meeting', 'Quarterly Review', 'End-Point Review', and specific tasks like 'Audit a recurring workflow' and 'Create a "Current State" flowchart'. This sidebar is highlighted with a blue star and the number '1'. The bottom of the interface shows a 'Previous Login: 14 May 2026' timestamp.

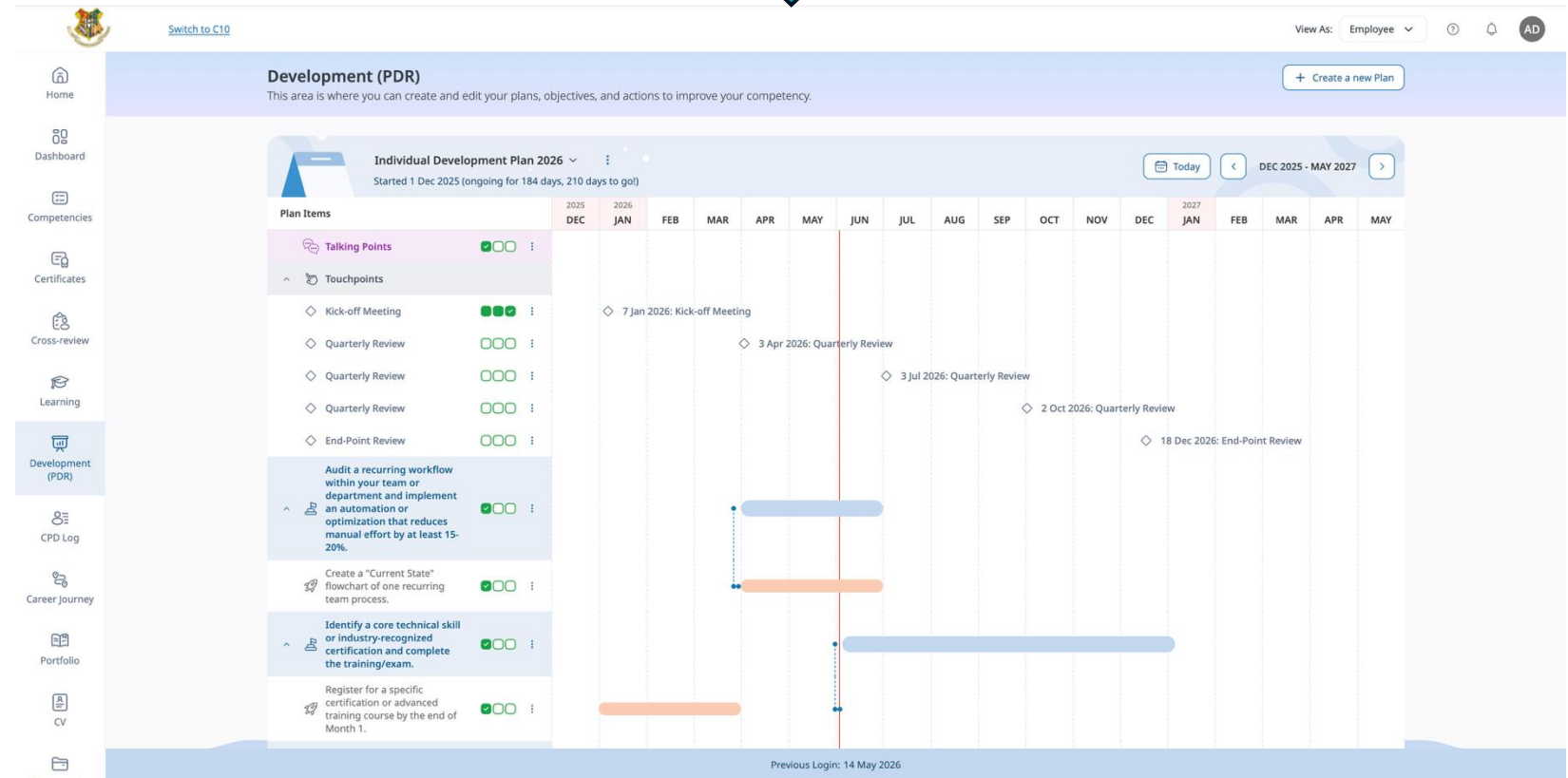


Completing a development plan

1

You have now updated and approved your plan; your Manager will approve from their view to move it to 'Approved' status. Every time you log in you will now see your updated plan, timeline, and progress

1



IDP Manager's Approval | Individual Development Plan

The IDP workflow allows for the creation of the plan, add or personalise Objectives, actions and talking points and for the Employee to 'approve'

Once objectives and actions are agreed in the 'Kick-off' Meeting the Manager 'approves' the Plan, from their profile and the Employee also 'approves' the plan from their profile

The Status will move from 'Not started' to 'Agreed'. As updates are made the status moves to 'on-going', at the end of year/plan the Manager closes the Plan to move it to 'closed' status

You can copy any objectives from a closed plan to a new/live plan if you wish for the following year

