

IDP Userguide - Manager

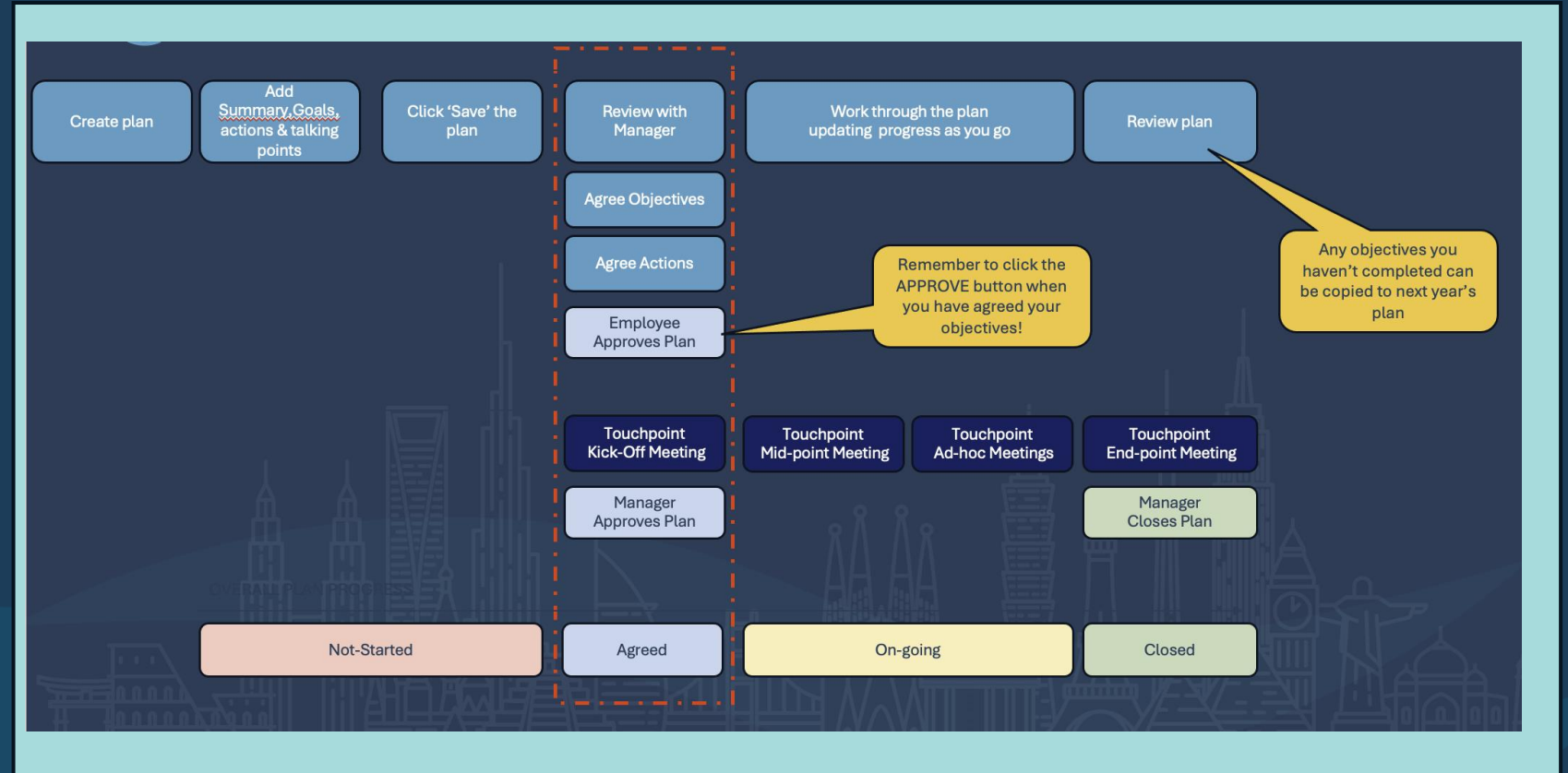
IDP Manager's Approval | Individual Development Plan

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



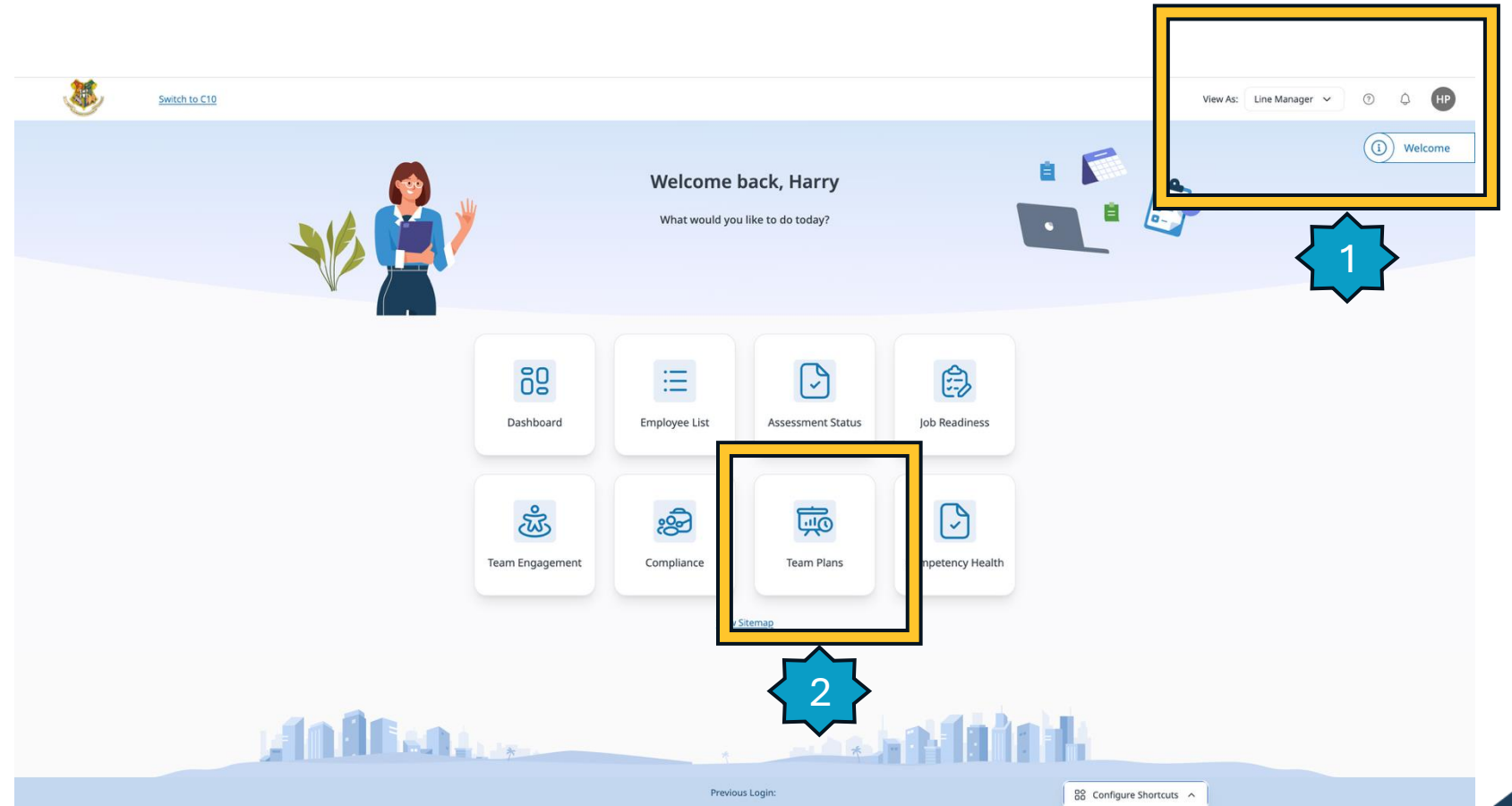
Manager | Approving a development plan

1

Ensure you are viewing
as a line Manager

2

Click 'Team Plans'



Manager | Approving a development plan

1

The Plan Status Bar gives an overview of where your direct reports are in the IDP workflow

2

The list of your team will appear here

3

To select an individual, click on the highlighted plan name

The screenshot shows the 'Team Plans' dashboard. A sidebar on the left contains navigation links: Home, Dashboard, Assessment Status, Heatmap, Gap Analysis, Job Readiness, Team Engagement, Compliance, Team Spider, Team Plans (highlighted), and Expert Tracker. The main content area has a blue header with 'Team Plans' and a subtitle 'Overview of the team's plans, with defined objectives and actions'. Below this is a 'Plan status' bar (annotated with a blue star 1) showing '100% (2) Plans Approved by Employees' and '0% (0) Plans Approved by Manager'. A progress bar below the status shows 2 'Not Agreed' (red), 0 'Agreed' (blue), 0 'Ongoing' (yellow), and 0 'Completed' (green). Below the status bar is a table (annotated with a blue star 2) showing 2 employees and 2 total plans. The table has columns: Employee, Current Job Profile, Plan Name, Plan Status, Approved (Employee), and Approved (Manager). The first row is for Dirk Cresswell, Associate application operations engineer, with a plan named 'Individual Development Plan 2026' (annotated with a blue star 3) that is 'Not Agreed' and approved on 14 May 2026. The second row is for Albus Dumbledore, Associate application operations engineer, with a plan named 'Individual Development Plan 2026' that is 'Not Agreed' and approved on 3 Jun 2026. The table has a 'Show 100 per page' option and a '1 of 1 pages' indicator.

Employee	Current Job Profile	Plan Name	Plan Status	Approved (Employee)	Approved (Manager)
DC Dirk Cresswell	Associate application operations engineer	Individual Development Plan 2026	Not Agreed	14 May 2026	---
AD Albus Dumbledore	Associate application operations engineer	Individual Development Plan 2026	Not Agreed	3 Jun 2026	---



Manager | Approving a development plan

1

The Employees IDP Plan will show this view

2

The Red Reminder Bar will stay in view until approved

3

You can click on the individual items to review and add updates/comments

4

Once mutually agreed click 'Approve plan as Manager'

The screenshot displays the 'Albus Dumbledore's Development (PDR)' interface. At the top, there is a header with the user's name 'AD' and a 'Switch to C10' link. Below the header, a red reminder bar states 'Please remember to approve the agreed plan' and 'Approved by employee on 3 Jun 2026'. A blue button labeled 'Approve plan as manager' is visible in the top right corner. The main content area shows a calendar view for 'Individual Development Plan 2026' with a timeline from 'Started 1 Dec 2025 (ongoing for 184 days, 21 days to go)' to '2027 JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC'. A list of items is shown on the left, including 'Talking Points', 'Touchpoints', 'Kick-off Meeting', 'Quarterly Review', 'End-Point Review', and 'Audit a recurring workflow within your team or department and implement an automation or optimization that reduces manual effort by at least 15-20%'. A yellow box highlights the 'Talking Points' and 'Touchpoints' items. A blue box highlights the 'Approve plan as manager' button. A red box highlights the red reminder bar. A blue box highlights the 'Approve plan as manager' button. A blue box highlights the 'Approve plan as manager' button.



Manager | Approving a development plan

1

Clicking on the title 3 dots and selecting update opens the right-hand panel

2

You can view the employee's progress

3

You can see the employee has approved the plan and can use the tick box from here to 'Approve' too

Switch to C10

AD Albus Dumbledore's Development (PDR)
This area is where you can create and edit your plans, objectives, and actions to improve your competency.

Please remember to approve the agreed plan

Individual Development Plan 2026
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

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

7 Jan 2026: Kick-off Meeting

3 Apr 2026: Quarterly Review

3 Jul 2026: Quarterly Review

2 Oct 2026: Quarterly Review

Previous Login:

1

2

3

Plan Progress
Individual Development Plan 2026

Plan Done / Sign-off

Approved by Manager

Approved by Employee
3 Jun 2026

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.

Save Progress



Manager | Approving a development plan

1

Click the Tick Box to Approve your Employee's plan

2

Click 'Save Progress' to complete the Approval

The screenshot displays the 'Albus Dumbledore's Development (PDR)' interface. A sidebar on the left contains navigation links: Home, Dashboard, Assessment Status, Heatmap, Gap Analysis, Job Readiness, Team Engagement, Compliance, Team Spider, Team Plans, and Expert Tracker. The main content area is titled 'Individual Development Plan 2026' and shows a timeline from December 2025 to December 2026. A 'Plan Items' table lists various activities with status indicators (green checkmarks for completed, empty boxes for pending). A 'Plan Progress' sidebar on the right shows a 'Plan Done / Sign-off' section with a 'Approved by Manager' checkbox (checked) and a 'Approved by Employee' checkbox (unchecked). Below this, a list of development items with progress bars and status indicators is shown. At the bottom right, a 'Save Progress' button is highlighted with a red box.

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							3 Jul 2026: Quarterly Review						
Quarterly Review											2 Oct 2026: 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													

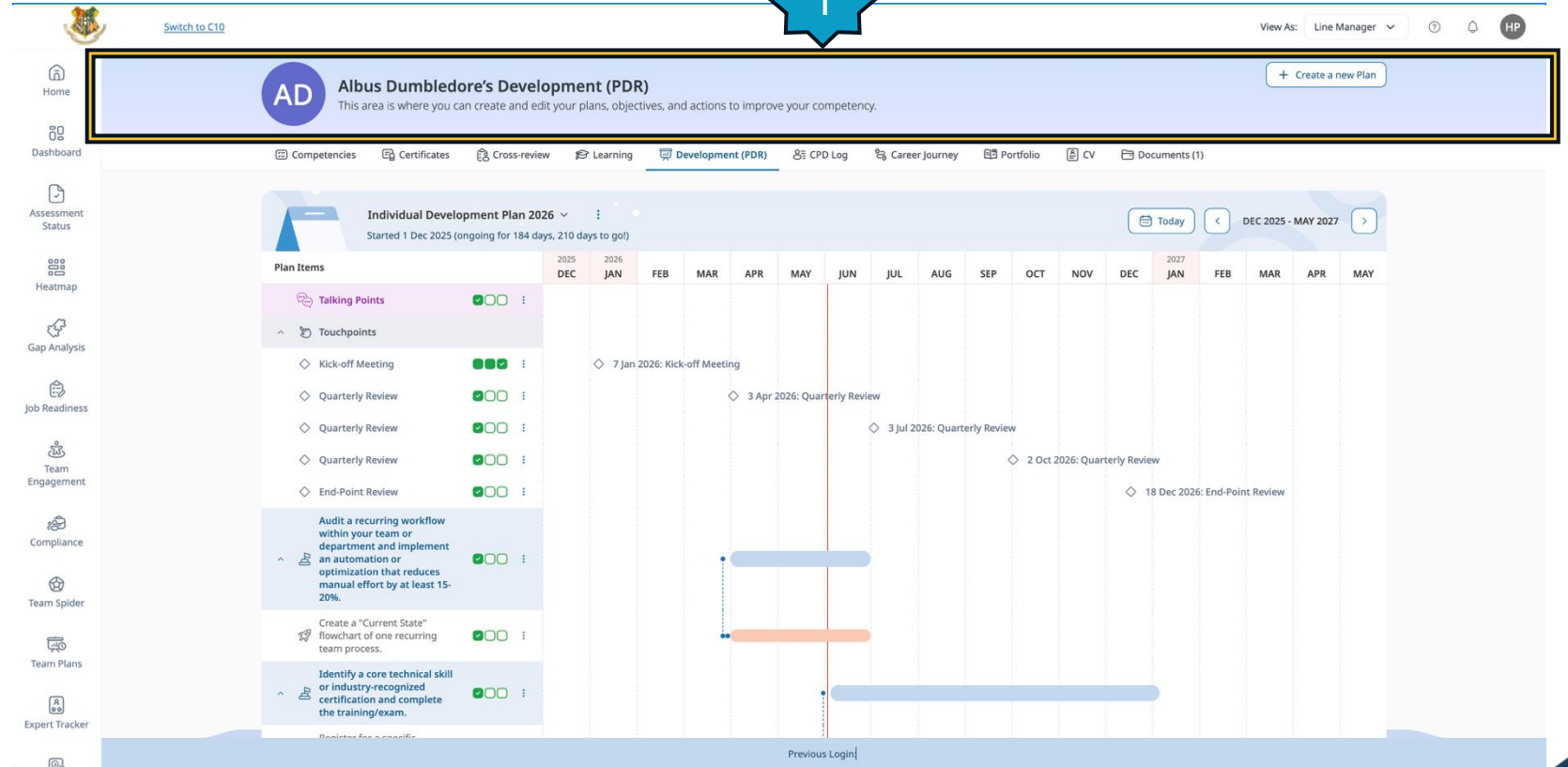
2



Manager | Approving a development plan

1

The red reminder bar has now been removed as the plan has been approved by both Employee and Manager and is in 'Approved' Status



Manager | Dashboard View

On your Manager Dashboard there are 2 tiles: one shows the numbers of IDP's and their status in the workflow and the second shows the % of Approvals for Employees and Line Manager

