



Personal Development Plan

Use this worksheet to clarify your leadership direction, assess your readiness, and identify the experience you need next. This exercise will help you clarify your career direction and allow you to have candid discussions with your manager.

Your Name _____

Current contribution: Where I add value today

- ☐ I own important client relationships and help protect continuity across generations.
- ☐ I contribute to business growth through relationships, referrals, market presence, or new opportunities.
- ☐ I develop colleagues, improve team performance, or help others succeed.
- ☐ I translate firm priorities into action and improve how work gets done.
- ☐ I contribute perspective on technology, change, risk, client experience, or other enterprise decisions.

Leadership path: Where I want to go

- ☐ I am interested in enterprise leadership or ownership, including responsibility for people, strategy, governance, growth, or succession.
- ☐ I am interested in expert advisor leadership, including complex client work, recognized expertise, and impact across the firm without a primary people management role.
- ☐ I am still exploring which path best fits my strengths and aspirations.

Over the next 12 to 24 months, I want to be ready to:

The principal-level responsibility I am ready to earn next:

Readiness: What the evidence shows

What have I already demonstrated through client outcomes, growth, talent development, strategic judgment, or enterprise contribution?

What capability, experience, or evidence is still missing?

My Rising Principal development plan

Turn your leadership goal into a practical sequence of experience, support, and accountability.

Leadership assignment

The next contribution or responsibility I am preparing to own:

The capability or judgment I need to strengthen:

Applied Development: How I will build readiness

1	Observe	Who will I observe and what leadership judgment should I notice?
2	Practice	Where can I rehearse the skill and receive useful feedback?
3	Apply	What live client, team, growth, or operating assignment will I own?
4	Feedback	Who will observe my work, debrief with me, and help me improve?
5	Evidence	What result or behaviour will demonstrate that I am ready?
6	Opportunity	What greater scope, authority, visibility, or economics could follow?

Support: The relationships that will help me

Mentor	Coach	Sponsor	Manager
<i>Perspective</i>	<i>Practice and feedback</i>	<i>Visibility and advocacy</i>	<i>Priorities and resources</i>

Name:

Name:

Name:

Name:

Mutual commitment: The contribution and opportunity conversation

What is the *Rising Principal's* commitment needed to make this plan credible?

Rising Principal Signature

Firm Leadership Signature**Next steps: My next 90 days**

First Action	Accountability Partner	Review Date
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