

Individual Growth Plan

Prepared For: Avery Smart Co.

Report Details

Talent

John Doe, BA

HR Lead/Title

Jane Doe

Sponsors Interviewed: 3

Growth Target

Grow

GloCoach Consultants

Lance

3rd Party Assessment

Yes

Date

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Talent Descriptor

John combines disciplined execution with integrity-based collaboration, consistently driving high-quality results while fostering trust and loyalty across teams. Sponsors praise his passion, reliability, and structured work habits; simultaneously, both 3PA and 360 feedback pinpoint strategic visioning, talent development, and broader influence as his primary growth frontiers.

Overarching Themes

1) Relentless focus on outcomes and time management; 2) Values-driven relationship building anchored in acceptance, loyalty, and mentorship; 3) Need to shift from individual execution toward future-oriented, empowering leadership; 4) Strong analytical expertise balanced by a desire for greater creative and innovative exposure.



This word cloud displays most discussed growth themes (depicted in orange/brownish colors) as well as supporting strengths themes (highlighted in blueish colors), providing some insights in most mentioned key words while also allowing to lever on personal strength for further growth.

Talent Descriptor

Talent's Self-Description

John is described as an honest, kind, and helpful individual by his close friends, reflecting strong personal values and a supportive nature.

Sponsor's Description

John Doe combines passion, reliability, and a strong work ethic to produce consistently high-quality results that energize those around him. His integrity, kindness, and readiness to help cultivate a collaborative, trustworthy atmosphere and foster strong relationships across the team. Supported by excellent time-management skills and solid expertise, he meets commitments with confidence and drives overall productivity. Continuing to develop stronger followership capabilities will further amplify his positive influence and align the team around shared goals.

3rd Party Assessment (3PA) Summary

1. Identify Foundational Value System

Acceptance, Loyalty, and Mentorship surface as core drivers, steering John toward transparent, trustworthy, and growth-oriented interactions.

2. Analyze Natural Tendencies versus Observed Behaviors

Considering the insights from the reviewed 3PA, the natural tendencies of the Talent as compared to the observed behavior show a strong internal pull toward inclusive collaboration and mentoring, yet OBA data reveal more time spent on personal

execution than collective uplift. His intrinsic curiosity and adaptability register high in 3PA scores, but limited horizon scanning in day-to-day practice tempers this potential.

3. Map Traits to GCLM Competencies

Values of loyalty and mentorship align with **Develops Talent** and **Builds Followership**; analytical strength maps to **Thinks Analytically** and **Drives Results**; courage reflects **Displays Courage**; curiosity links to **Shows Curiosity**; strategic aspiration connects to **Demonstrates Forward Thinking**.

4. Highlight Confirmations and Contrasts

Confirmations: 3PA's high scores in analytical thinking and reliability mirror OBA praise for outcome orientation. Contrasts: while 3PA indicates a natural propensity for creative exploration, OBA highlights a cautious, perfection-driven reluctance to delegate and innovate, suggesting untapped capacity in **Shows Business Agility** and **Influences Others**.

5. Recommend Development Pathways and Coaching

Pair executive coaching focused on **Demonstrates Forward Thinking**, **Develops Talent**, and **Influences Others** with stretch assignments that require delegation and strategic storytelling. Encourage participation in cross-industry innovation forums to convert latent curiosity into observable creative leadership.

Develop the Ability To (DTAT) Table

This section highlights the competencies and abilities that can support the talent's future growth. This is not to be read as an assessment, rather like a development discovery, listing a small number of behaviors that, if strengthened, will have the biggest impact on the talent's development journey and long-term success.

Competencies with strong demonstrations (typically scoring 8 or above) are not listed here since this section is intentionally dedicated to areas with the most room for future growth and leverage.

Competency	Develop the ability to	Observation-based evaluation of the talent's competency (1 - 10)
Develops Talent	Delegate authority and step away from the details of execution	4
	Provide critical feedback in a direct and constructive way	4
	Build the capability of individuals through their work assignments	4
Influences Others	Create and communicate the mission and vision for your team	5
	Influence others by creating a compelling vision	5
	Present story and rationale with clarity and confidence	5
Demonstrates Forward Thinking	Anticipate the implications and consequences of various future paths	4
	Consider different future state options and their associated trade-offs	4
	Develop forward-looking plans	4

Rating Scale and Interpretation:

Score	Meaning	Interpretation
1 - 2	Emerging Awareness	Talent is beginning to develop this competency; early behaviors may not show consistently yet. Opportunity for foundational growth.
3 - 4	Early Development	Talent shows some initial behaviors. With support and focus, this area can develop quickly.
5 - 6	Developing Strength	Competency is present in many situations. Continued practice can strengthen consistency and impact.
7 - 8	Strong Demonstration	Talent demonstrates the competency well. This is a reliable capability and can be leveraged as a strength.
9 - 10	Exceptional Mastery	Talent consistently excels in this behavior and may serve as a role model in this area.

Note that this initial rating is based on GloCoach's AI-powered insights on the Talent, considering the Growth Competency descriptions, behaviors and outcomes from all interviews. This pre-rating is open for discussion and reevaluation during the Developing Briefing Meeting with our GloCoach Consultant and Client Representatives, such as Talent Leader and/or HR Leader.

Recommendations

To further enhance **John Doe's** capabilities, it is recommended to focus on developing his strategic and creative leadership skills. By leveraging his existing strengths in analytical thinking and leadership, **John** can broaden his impact across departments and drive innovation. Engaging in cross-functional leadership programs and strategic storytelling coaching will help him refine his ability to influence and inspire others. Additionally, expanding his exposure to external industry trends will provide valuable insights for strategic decision-making.

Action: Enroll in a strategic design certification program such as IDEO U or HarvardX.

Rationale: This will enhance **John's** ability to facilitate cross-functional collaboration and drive innovation within the organization.

Implementation Guidance: Encourage **John** to apply the learnings from the certification to real-world projects, fostering a culture of innovation and strategic thinking within his team.

Action: Participate in the 2026 Cross-Functional Leadership Academy cohort.

Rationale: This program will provide **John** with exposure to diverse leadership styles and strategic challenges, broadening his perspective and enhancing his leadership capabilities.

Implementation Guidance: Support **John** by providing opportunities to apply the skills learned in the academy to cross-departmental projects, reinforcing his development and impact.

3rd Party Assessment

The assessment of **John Doe** highlights his strong analytical skills, leadership potential, and adaptability. He excels in data interpretation and critical thinking, which directly impacts business revenue streams. His ability to maintain high credibility with

senior stakeholders and his proactive mentorship of junior analysts are notable strengths. However, there are opportunities for **John** to expand his involvement in strategic initiatives and enhance his creative leadership competencies. The report suggests that he could benefit from further exposure to global market trends and risk mitigation strategies, as well as from enhancing his public speaking confidence.



SMART Goals

Develops Talent

Ability: Delegate authority and step away from the details of execution

John Doe will strengthen the Growth Competency of **Develops Talent** by delegating authority and stepping away from execution details. He will identify a minimum of three on-going project areas and assign full decision-making responsibility to qualified team members, documenting the delegation scope, success metrics, and required resources in a shared tracker. He will limit his direct task involvement to advisory input documented as less than 20 % of total comments or code contributions. Effectiveness will be evaluated through 360-degree feedback showing at least a one-point increase on the **Develops Talent** competency and written reflection reports from each delegate confirming autonomy and skill growth.

Develops Talent

Ability: Provide critical feedback in a direct and constructive way

John Doe will strengthen the GCLM competency “Develops Talent” by delivering direct, constructive feedback that balances at least one growth area with one actionable suggestion in five consecutive one-to-one discussions with his direct teammates. He will prepare using a simple three-point feedback template, request verbal confirmation of understanding, and document each conversation in the team’s shared tracker. Success will be measured by (a) a 20% improvement in his feedback-effectiveness rating in the next pulse survey and (b) at least four of the five teammates self-reporting that the guidance was clear, respectful, and useful.

Develops Talent

Ability: Build the capability of individuals through their work assignments

John Doe will strengthen his **Develops Talent** competency by systematically building each team member’s capability through targeted work assignments. He will co-create development plans with every direct report and assign at least one stretch project aligned to the skills identified, granting full ownership for execution. Success will be measured by (1) documented plans and stretch assignments for 100 % of reports, (2) regular coaching

notes recorded in the shared tracker, and (3) post-project surveys evidencing a minimum 15 % improvement in each individual's self-rated proficiency versus baseline.

Influences Others

Ability: Create and communicate the mission and vision for your team

John Doe will strengthen his **Influences Others** competency by crafting a clear, one-page mission and vision statement for his team and communicating it through at least three formats (live meeting, written summary, and visual slide deck). He will verify impact by achieving: a) an average score of 4.0 or higher on an anonymous 5-point survey asking team members to rate clarity and inspiration of the vision; b) at least 80% of team members accurately recalling the mission and two key vision elements during random check-ins conducted by his manager.

Influences Others

Ability: Influence others by creating a compelling vision

John Doe will elevate his **Influences Others** competency by crafting and circulating a concise, inspiring vision for his current program, securing at least 80 % verbal or written commitment from key stakeholders. He will engage three cross-functional peers to review and refine the message, incorporate their feedback, and rehearse delivery until he can articulate the vision in under two minutes with clear business outcomes and emotional resonance, as validated through a pulse survey scoring an average of 4 / 5 or higher on "vision clarity and inspiration."

Influences Others

Ability: Present story and rationale with clarity and confidence

John Doe will strengthen the **Influences Others** competency by designing stakeholder narratives that follow a problem-action-benefit structure, rehearsing with a peer, and integrating feedback until observers consistently rate him at least 4 out of 5 for clarity, confidence, and persuasiveness on post-presentation surveys. Measurement will include anonymous scores from at least three audience members per session and tracking

of requested follow-up actions versus presented recommendations, targeting 80% alignment. Success will demonstrate his ability to present story and rationale with clarity and confidence, thereby expanding his influence across teams.

Demonstrates Forward Thinking

Ability: Anticipate the implications and consequences of various future paths

John Doe will strengthen **Demonstrates Forward Thinking** by systematically producing a concise scenario brief for every new project he leads, outlining at least three potential future paths, the key assumptions, expected consequences, and proposed mitigation actions. Success will be measured when 100% of his scenario briefs are shared with project stakeholders, at least 80% of surveyed peers rate the briefs as illuminating future risks and opportunities, and a minimum of two mitigation recommendations per project are incorporated into the final execution plan. This practice will embed anticipatory thinking into his daily leadership routine.

Demonstrates Forward Thinking

Ability: Consider different future state options and their associated trade-offs

John Doe will elevate his **Demonstrates Forward Thinking** competency by embedding structured scenario analysis into every significant initiative he leads. For each initiative, he will produce at least three distinct future-state options, document the strategic trade-offs (benefits, risks, resource impacts) in a single-page matrix, and present the matrix to core stakeholders for feedback. Success will be measured by (a) stakeholder confirmation that options and trade-offs were clear and comprehensive on 90% of initiatives, and (b) adoption of at least one proactively identified adjustment in two-thirds of those initiatives, reflecting improved anticipation and strategic choice.

Demonstrates Forward Thinking

Ability: Develop forward-looking plans

John Doe will strengthen his **Demonstrates Forward Thinking** competency by producing a documented product roadmap that extends three planning horizons (near,

mid, long term) and includes at least two emerging-trend opportunities, three quantified risks, and corresponding mitigation steps for each horizon. He will validate the roadmap through structured feedback sessions with a minimum of five stakeholders and integrate a summary of stakeholder input into the final version. Goal achievement will be confirmed when his manager and two sponsors score the roadmap 4 / 5 or higher for strategic clarity, risk anticipation, and practicality.



Engagement Activities

Strategic Delegation Workshop



Through Training

Target Competency: Develops Talent

Activity: Participate in a workshop focused on effective delegation techniques. The workshop will cover how to delegate authority and step away from the details of execution, providing critical feedback in a direct and constructive way, and building the capability of individuals through their work assignments.

***Impact:** Participants will learn to delegate tasks effectively, freeing up time for strategic thinking and allowing team members to grow. This will lead to improved team performance and increased capacity for leadership tasks.*

Visionary Leadership Sessions



With Coach

Target Competency: Influences Others

Activity: Engage in coaching sessions that focus on creating and communicating the mission and vision for your team. These sessions will help in developing the ability to influence others by creating a compelling vision and presenting stories and rationales with clarity and confidence.

***Impact:** These sessions will enhance the ability to inspire and rally colleagues around a shared vision, leading to increased team cohesion and motivation. This will also improve the ability to drive collective momentum towards organizational goals.*

Future Planning and Scenario Analysis



At Work

Target Competency: Demonstrates Forward Thinking

Activity: Implement a regular practice of future planning and scenario analysis within the team. This involves anticipating the implications and consequences of various future paths, considering different future state options and their associated trade-offs, and developing forward-looking plans.

Impact: *By regularly engaging in future planning, the team will be better prepared for market shifts and emerging trends. This proactive approach will enhance strategic decision-making and position the team to capitalize on future opportunities.*



GloCoach Leadership Model 3.0

The **GloCoach Leadership Model** is based on 32 behavioral competencies which we have identified in exceptional leaders. They are organized in three areas: Developing Relationships, Developing Your Business and Developing Yourself. Leaders who consistently demonstrate these behaviors deliver exceptional results. Most people, however, have Growth Competencies—derailing habits or underdeveloped competencies which are counterproductive to or deficient of the behaviors below.

Developing Yourself	Developing Relationships	Developing Your Business
Allocates Time	Builds Followership	Demonstrates Forward Thinking
Communicates with Credibility	Collaborates Across Boundaries	Demonstrates Initiative
Demonstrates Resilience	Delegates	Drives Results
Displays Courage	Develops Talent	Embraces Change
Embodies Functional Expertise	Focuses on Customers	Makes Decisions
Exhibits Emotional Intelligence	Influences Others	Prioritizes
Manages Details	Leads Teams	Shows Business Agility
Manages Projects	Leads with Humility	Solves Problems
Projects Executive Presence	Manages Conflicts	Thinks Analytically
Shows Curiosity	Manages Performance	Thinks Enterprise-Wide
	Values Diversity	Thinks Strategically

Developing Yourself

- **Allocates Time:** The ability to effectively plan, sequence and invest time to accomplish tasks and meet deadlines, for the greatest returns.
- **Communicates with Credibility:** The ability to leverage written and live communications to efficiently and effectively share information, insights, and perspectives with well-supported data in a trustworthy and convincing manner which builds credibility with stakeholders.
- **Demonstrates Resilience:** The ability to effectively engage and navigate challenges, bounce back from setbacks, identify opportunities, and maintain consistent re-energization for personal well-being and positive team interactions.
- **Displays Courage:** The ability to trust one's expertise and judgment by demonstrating a mindset to challenge conventional norms amidst uncertain situations and to take risks that enable the team to confidently and productively address challenges, overcome fear and doubt, and result in positive outcomes.
- **Embodies Functional Expertise:** The ability to demonstrate the range of function-specific skills and technical expertise required for success in a particular role, exemplifying in-depth knowledge and in the proficient execution of designated responsibilities.
- **Exhibits Emotional Intelligence:** The ability to be aware of and understand workplace dynamics, maintain positional roles, and effectively self-regulate emotions in a wide variety of circumstances.
- **Manages Details:** The ability to ensure work and information are complete, consistent and accurate through focus on the specifics, smallest elements and intricacies in a task.
- **Manages Projects:** The ability to effectively plan, organize, maximize resources, oversee, and drive projects within project timelines, from start to finish, effectively engaging multiple stakeholders across functions.
- **Projects Executive Presence:** The ability to authentically and intentionally demonstrate confidence and dignity in one's positional roles through skillful verbal and non-verbal communication within the immediate team and adeptly adapting one's approach when engaging with higher management.
- **Shows Curiosity:** The ability to appreciate what we don't know and see value in continuous learning.

Developing Relationships

- **Builds Followership:** The ability to build purpose, meaning, and vision for the future and inspire others to join you in the journey.
- **Collaborates Across Boundaries:** The ability to develop, maintain, and strengthen collaborative relationships beyond the immediate team.
- **Delegates:** The ability to discern and delegate tasks based on individual strengths, distinguishing between those that are best suited for oneself and those that support the growth of others as managers and leaders.
- **Develops Talent:** The ability to regularly assess the skills and talents of team members, and continually invest time to nurture and grow individuals into future roles.
- **Focuses on Customers:** The ability to effectively anticipate the needs and expectations for internal and external customers, and to serve as their advocate.
- **Influences Others:** The ability to use your experience and insight to inspire, persuade, and motivate others to shift their views and behaviors when requested.
- **Leads Teams:** The ability to consistently leverage individual strengths, promote collaboration and trust, and use clear communication to guide and inspire a team towards achieving goals effectively and efficiently.
- **Leads with Humility:** The ability to put the needs of others first and serving them with respect and dignity, with the aim of empowering and developing individuals and teams to achieve their full potential.
- **Manages Conflicts:** The ability to resolve disagreements and disputes by focusing on the issue and not the person, which minimizes unnecessary friction and maximizes alignment and progress on priorities.
- **Manages Performance:** The ability to set expectations, provide feedback and accountability, measure and recognize outcomes, and communicate issues promptly and effectively.
- **Values Diversity:** The ability to appreciate, respect and invite diverse perspectives, cultures and backgrounds of others in the workplace and social interaction.

Developing Your Business

- **Demonstrates Forward Thinking:** The ability to anticipate future trends and develop forward-looking innovative solutions, taking appropriate steps to move forward and to mitigate risks.
- **Demonstrates Initiative:** The ability to survey a situation, identify what needs to be done, and proactively take ownership of the solution.
- **Drives Results:** The ability to focus on outcomes and have the persistence to take initiative on the issues that will drive those outcomes.
- **Embraces Change:** The ability to successfully adapt, see change as a natural momentum in business, communicate change strategies with convincing, well-supported reasons, and lead others through new initiatives for effective implementation and deployment of the organization's capabilities.
- **Makes Decisions:** The ability to evaluate options, identify key stakeholders, and make specific decisions in a timely manner.
- **Prioritizes:** The ability to identify and sequence the right tasks and focus areas, in light of constraints and tradeoffs, to maximize output.
- **Shows Business Agility:** The ability to learn and adjust one's approach to changes in the environment and new business opportunities.
- **Solves Problems:** The ability to identify problems and barriers, articulate a plan, and resolve situations effectively.
- **Thinks Analytically:** The ability to gather, process, synthesize and extract insights from complex sets of information and interpret information to establish and provide a point of view.
- **Thinks Enterprise-Wide:** The ability to conceptually see across the entire business enterprise and appreciate the functional tradeoffs associated with multiple solution options.
- **Thinks Strategically:** The ability to analyze, plan, and make strategic decisions with a near or mid-term perspective, consider various paths towards a focused future state, anticipate the implications and tradeoffs associated with the different path options with mitigated risks.