EMPLOYEE PROFILE

The following template will help you prepare the profiles of your employees.

Name: **Title:**

Retirement Eligibility Date: **Projected Retirement:**

Department: **Years in Position:**

Willing to Relocate?: ☐ **Yes** ☐ **No**

Demonstrated Strengths

Growth Areas

Career Aspirations

Core Competency and Behavioral Needs

Core competencies are the resources and capabilities that comprise the strategic advantages of a business. A business must define and cultivate its core competencies in order to succeed against the competition.

Examples include: coaching, change management, conversational agility, decision-making skills, assertiveness, emotional agility, time management, motivation and commitment to tasks, adaptability and flexibility, problem-solving, superior written and verbal communication skills, taking initiative, and grit — that is, the demonstration of perseverance required to achieve a desired goal

Learning Needs (knowledge, skills, abilities, experience, etc.)

Employee Profile:

Learning Plan

3-6 months

Development Area	Action	Timeline

Progress/Comments/Notes

6-12 months

Development Area	Action	Timeline

Progress/Comments/Notes

12+ months

Development Area	Action	Timeline

Progress/Comments/Notes

Knowledge Transfer Plan (the structured framework or strategy designed to systematically capture, preserve, and disseminate valuable knowledge, expertise, and insights within an organization)

Employee Profile:

Cross-Functional Competencies

Cross-functional competencies are those that are not directly related to a specific task or responsibility. However, they are very important in carrying out tasks across different functions and departments. Some examples here are teamwork, computer skills, facilitation, planning, etc.

Examples include: team-building, meeting management, project management, collaboration, facilitation, planning, conflict resolution, accountability, delegation, transparency, empathy, active listening, reflective listening, difficult conversations, over-communication, setting and managing expectations, negotiation

Learning Needs (knowledge, skills, abilities, experience, etc.)

Learning Plan

3-6 months

Development Area	Action	Timeline

Progress/Comments/Notes

6-12 months

Development Area	Action	Timeline

Progress/Comments/Notes

Employee Profile:

Learning Plan, Continued

	Development Area	Action	Timeline
12+ months			

Progress/Comments/Notes

Knowledge Transfer Plan (the structured framework or strategy designed to systematically capture, preserve, and disseminate valuable knowledge, expertise, and insights within an organization)

Functional Competencies

Functional competencies, sometimes called technical competencies, define the specific skills that professionals in a given field or position require on a daily basis. They are job-specific and relatively easy to identify in terms of the elements of success they require.

Examples for financial planning include: the ability to analyze financial data, forecast future trends, and develop strategies to achieve financial goals while managing risks and ensuring compliance with regulations, as well as the ability to plan, allocate, and manage financial resources effectively and efficiently to achieve business objectives while ensuring compliance with financial policies and regulations

Examples for HR and talent manage specifically include: the ability to identify, attract, develop, and retain high-performing individuals who align with the organization's goals and values, ensuring a sustainable talent pipeline

Learning Needs (knowledge, skills, abilities, experience, etc.)

Employee Profile:

Learning Plan

3-6 months

Development Area	Action	Timeline

Progress/Comments/Notes

6-12 months

Development Area	Action	Timeline

Progress/Comments/Notes

12+ months

Development Area	Action	Timeline

Progress/Comments/Notes

Knowledge Transfer Plan (the structured framework or strategy designed to systematically capture, preserve, and disseminate valuable knowledge, expertise, and insights within an organization)

Employee Profile:

Employee's Signature	**Date**
Manager's Signature	**Date**