**Professional Growth Planning Session**

**Mid-Year Agenda**

**YOUR ACCOMPLISHMENTS & CONTRIBUTIONS**

* How are your strengths contributing to the successful fulfillment of your role?
* Review specific accomplishments over the past 6 months.

**CHALLENGES & OBSTACLES**

* Are there any specific areas for improvement that will impact your success in this role, and ultimately the experience we offer our clients?
* Discuss any tasks or projects that were less than successful and why. What would have helped you make them successful?
* What is your strategy to improve this situation in the next 30 days?

**ADVISORY PRACTICE GOALS FOR THE NEXT YEAR –** *What is left to achieve?*

* Provide overview of where the practice is mid-year as compared to annual results.
* Highlight key initiatives that drove and continue to drive these results.
* Discuss/talk about/explain/strategize about any unexpected results and what needs to happen to achieve these goals by the end of the year.
* Where and how can we be better equipped to enhance our client service and experience? What additional training or support do you need? Be specific.

**YOUR GOALS FOR THE NEXT YEAR –** *What is left to achieve?*

* Professional Development Goal: *Discuss action item(s) to achieve this.*
* Practice Management Goal: *Discuss action item(s) to achieve this.*
* Performance (or Other) Goal: *Discuss action item(s) to achieve this.*
* Identify what we can do to increase the effectiveness of our practice as a whole and specifically for you as an individual team member.

**OTHER ITEMS FOR DISCUSSION**

* Is there anything else you would like to discuss?

**MEETING WRAP UP**