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Personal Business Plan Worksheet

GOALS

I. LONG TERM GOAL STATEMENT:

II. SHORT TERM GOALS:

LONG-TERM SKILL / CAREER DEVELOPMENT PLAN

Your Business Plan includes all needs – including increasing social connections, skills development in the areas of writing, teaching, service and leadership, building collaborations, trainings, or any other items that could help prepare the client to reach their career goals. Additional items can be added throughout the coaching process.

NEED	ACQUISITION PLAN (date)

Last update: _____

CAREER DEVELOPMENT PLAN YEAR _____

I. MAJOR MILESTONES

1.		
Steps	Proposed Date	Completed Date
2.		
Steps	Proposed Date	Completed Date
3.		
Steps	Proposed Date	Completed Date
4.		
Steps	Proposed Date	Completed Date

II. PROFESSIONAL CONTACTS AND COMMUNITY

Membership, Service, Organizing, and Attending		
Type and Venue	Proposed Date	Completed Date
Type, Name, and Venue		
	Proposed Date	Completed Date
Collaboration Opportunities with Colleagues (Internal and External)		
Type, Name, and Venue	Proposed Date	Completed Date
Board Membership and Positions		
Publication Title, Publication Outlet, and Position	Proposed Date	Completed Date

III. COACHSHIP, LEADERSHIP, AND SERVICE

Type	Proposed Date	Completed Date
Type	Proposed Date	Completed Date
Hosting Speakers, Seminars, Retreats		
Type, Name, and Venue	Proposed Date	Completed Date

ACCOUNTABILITY

You should review the list of things you want to accomplish and identify barriers, interruptions etc. that is interfering with accomplishment. **Submit them to your accountability partner at least once per month.**

	Meeting goals (Y/N; comments)
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	

Submission Date: _____

Client Self-Assessment

Use this grading scale to complete the assessment.

5 = All the time

4 = A great deal of the time

3 = A moderate amount of the time

2 = Not very often

1 = never

	5	4	3	2	1
I treated my coach respectfully					
I undertook scheduling meetings as my responsibility					
I met my coach when scheduled					
If I had to cancel a meeting, I gave advance notice					
If I had to cancel a meeting, I rescheduled promptly					
I was open in sharing personal experiences and information					
I made clear my expectations concerning confidentiality					
I respected differences in our values and perspectives					
I sought critical feedback					
I collaborated in establishing developmental priorities for partnership					
I was satisfied with the level of trust we achieved					
I did not resist considering alternatives that were out of my comfort zone					
I reflected on lessons learned even from efforts that were not successful					
I devoted an optimum amount of time to our partnership					
I maintained continuity of discussions of our priorities					
I reflected on suggested solutions rather than suggesting solutions					
I enabled learning more than I taught					
I offered alternatives to achieve desired professional development					
I was committed to our partnership's success					