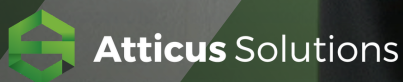




The Filipino Offshore Leadership System





MANAGER'S TOOLKIT | MODULE 06

Career Management

Building Careers That Keep People

Career development is one of the strongest retention levers you have as a manager. When employees see a path forward, they stay.



MODULE OVERVIEW



What's In This Module

This module gives managers the tools and frameworks to actively support employee career growth. Development plans should be intentional, aligned with employee aspirations and organizational goals, and focused on strengthening current skills while preparing people for higher-level roles.

Section	What It Covers
Objective and Desired Outcomes	What career management should achieve for employees, managers, and the organization.
Annual and Monthly Goal Setting	How to set career goals that connect individual aspirations to business priorities.
Career Ladder Process	Five steps to defining, communicating, and developing career progression.
Team Career Development Plan	How to build a team-level roadmap for collective growth.
Individual Development Plan (IDP)	A fillable template for tracking each employee's development journey.
Training and Development Considerations	Types of training and the cultural context for Filipino teams.
Career Discussion Framework and Timeline	When to have which conversations, and what each one should cover.
Leadership Potential Competencies	The competency framework for assessing leadership readiness.
Capability Benchmarking Template	A structured tool for assessing employees against career level requirements.
Manager Actions and Guidance	What managers should do consistently to drive career development.

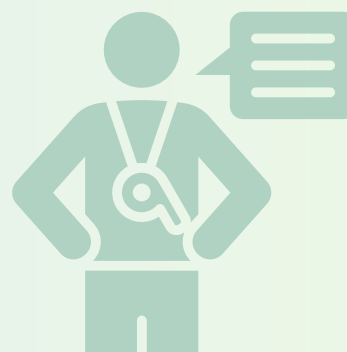


FOUNDATION

Objective and Desired Outcomes

Career management equips managers with practical tools and structured frameworks to actively support employee career growth. Development plans should be intentional, aligned with both the employee's aspirations and organizational goals, and focused on strengthening current skills while preparing employees for higher-level roles.

In Filipino workplaces, coaching and mentoring are highly valued. Employees respond better to personalized guidance and intentional development plans than generic training. Promotions are also a cultural norm in the Philippines. If the organization is lean, individual contributor positions may be broken down into levels to provide career progression anchored on expertise.



The Business Case for Engagement

For Employees	For Managers	For the Organization
Clear, personalized career paths with visible growth opportunities	Confidence in guiding development conversations and growth initiatives	Proactive, structured, and strategically aligned career development
Empowerment to enhance current skills and acquire new competencies	Tools to identify high-potential employees and prepare them for leadership	A deep leadership bench and a succession pipeline
Clear performance expectations through annual and monthly goal setting	A team roadmap that supports succession planning	Reduced attrition rooted in career dissatisfaction

TOOL 01

Annual and Monthly Goal Setting

Purpose: Create clarity on expectations and ensure alignment between employee aspirations, team objectives, and organizational goals.



Filipinos value inclusiveness and being part of a community. Help employees understand how they fit into the larger picture and how their growth connects to the team and the business. This helps them see opportunities beyond their current role.

Annual Goal Setting (Start of Year)

- Managers conduct a planning session with employees to set annual career and performance goals.
- Goals should be SMART: specific, measurable, achievable, relevant, and time-bound.
- Align individual and team goals with organizational priorities.

Monthly Goal Setting and Review

- Break annual goals into actionable monthly objectives.
- Track progress on deliverables, skill development, and key milestones.
- Adjust monthly goals as needed based on performance, business priorities, or learning opportunities.



Career and Performance Timeline

Conversation Type	Timeline	Purpose	Manager Role
Annual Goal Setting	Start of year	Set annual career and performance goals	Coach, align with team and org objectives
Monthly Goal Setting and Review	Monthly	Track progress, adjust objectives	Guide, provide resources, reinforce development
Quarterly Check-ins	Every 3 months	Review development, identify gaps	Coach, advise, provide resources
Mid-Year Performance Evaluation	June	Evaluate performance against annual goals	Give feedback, adjust development plans
Annual Career and Performance Review	December	Review overall performance and career trajectory	Align expectations and future opportunities
Development Planning	Twice a year	Identify skills and training needs	Provide guidance and access to programs





TOOL 02

Career Ladder Process

Purpose: Provide a structured approach for defining career progression, aligning employee development with organizational needs, and intentionally preparing employees for leadership or expert-level roles.

Step 1: Define Career Levels and Competencies

- Clearly outline roles, responsibilities, and expectations for each career stage (for example: Consultant, Senior Consultant, Principal Consultant, Solutions Architect).
- Identify requirements for each level: technical skills and leadership behaviors and competencies.
- Highlight skills needed to transition from current performance levels to higher-impact roles.

You may refer to the Atticus Leadership Competencies template as a starting point and create your own that is specific to your organization's priorities and needs.



Step 2: Communicate Career Paths

- Share transparent career ladders with examples of progression timelines and milestones.
- Include competencies, KPIs, and impact measures to show how skill development translates into career advancement.
- Reinforce how current skills can be enhanced to support future leadership or specialist roles.

Step 3: Individual Career Goal Setting

Managers should conduct structured discussions during 1:1s or performance reviews, identify short-term and long-term career goals aligned with the employee's strengths and aspirations, and ensure goals are designed to build leadership potential, technical expertise, or strategic capabilities.

Conversation starters for career goal setting:

Manager: I want your career to support your personal goals. Can you share your short and long-term personal goals with me?

Manager: What career advancement are you looking at that will allow you to achieve those personal goals?

Manager: Where do you see yourself in three years? What kind of work do you want to be doing?





Step 4: Develop Personalized Growth Plans

- Recommend targeted learning opportunities: training programs, mentorship, stretch assignments, cross-functional projects, or shadowing experiences.
- Identify specific skill gaps and provide resources or strategies to address them.
- Encourage employees to take ownership of their development journey.

Conversation starters for growth plan discussions:

Manager: Looking at your long-term goals, let's break down what you need to achieve each year to move closer to them.

Manager: You are strong at this. If you want to move up, we need to focus on developing this area.

Manager: This project is a great opportunity to develop the skills you said you wanted to build. Let's make sure you take it on with that goal in mind.

Step 5: Monitor Progress and Adjust

- Conduct quarterly check-ins to review progress, celebrate milestones, and adjust plans as needed.
- Align development efforts with evolving business priorities and employee performance.
- Adjust skill-building initiatives to prepare employees for leadership or expert-level responsibilities.

Employees do not need to be perfect before a promotion. If they hit 70-80% of the target role's requirements, the remaining areas can be part of their development plan while in the role. Assess whether the remaining gaps place the employee at an acceptable level of performance risk that leaders are willing to take.





TOOL 03

Individual Development Plan (IDP)

Use this template to document each employee's development journey. Initiate it during the annual review and update it continuously in coaching sessions. The IDP is a living document, not a once-a-year form.

Employee Name:

Role and Current Level:

Manager Name:

IDP Period (e.g. Jan-Dec 2025):

Career Goal (Where does the employee want to be in 1-3 years?):

Current Strengths (What is the employee already strong at?):

Development Areas (What skills or behaviors need to grow?):



Development Actions

Development Area	Action / Activity	Resource or Support Needed	Target Date	Status
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Stretch Assignment or Cross-Functional Opportunity:

Mentorship or Shadowing Plan:

Quarterly Progress Notes (Q1):

Quarterly Progress Notes (Q2):

Quarterly Progress Notes (Q3):

Quarterly Progress Notes (Q4):

Year-End Summary: What was achieved? What carries forward?



TOOL 04

Team Career Development Plan

Purpose: Provide a team-level roadmap showing employees what they can achieve next, how to grow collectively, and how individual development aligns with team and organizational goals.

Step 1: Assess Team Skills and Current Roles

- Identify each team member's strengths, current skill levels, and potential growth areas.
- Map these against the career ladder and future role expectations.

You may use the Atticus Leadership Competencies and Capability Benchmarking templates for this. The templates follow defined competencies and capabilities per level. Customize them to reflect what is valuable and applicable to your organization.

Team Skills Overview

Employee	Current Role / Level	Key Strengths	Development Areas	Target Role





Step 2: Define Team Goals and Growth Opportunities

- Determine short-term and long-term team objectives.
- Highlight opportunities for stretch projects, cross-functional exposure, and leadership responsibilities.

Manager: If you are looking at developing this skill, this project provides a great opportunity to put it into practice. Let's make sure you are in the room for this one.

Step 3: Align Individual Aspirations With the Team Path

- During career discussions, link individual goals with team-level achievements.
- Show employees how their skill growth contributes to team success and prepares them for future roles.

Step 4: Encourage Collective Learning and Mentorship

- Promote knowledge-sharing, peer coaching, and mentorship within the team.
- Encourage collaboration on development initiatives to accelerate team growth.

Ideas for team-based learning:

- Mindful Mondays: team reflection or reading share.
- Brownbag Tuesdays: informal knowledge sharing sessions.
- Workshop Wednesdays: skill-building workshops led by team members.
- Idea Lab Thursdays: open forum for new ideas and problem-solving.
- Learning Circle Fridays: peer coaching and development check-ins.

Pair team members with more senior employees or leaders for coaching and mentoring sessions specific to individual development goals.



TOOL 05

Training and Development Considerations

Manager Responsibilities: recommend relevant skills development programs aligned with career growth objectives, ensure employees have access to internal and external learning opportunities, and monitor application of learning in daily work.

Types of Training to Consider

Training Type	What It Covers	Best For
Technical Skills	Job-specific tools or software, advanced competencies for expert-level performance	Employees building toward Principal or Solutions Architect level roles
Leadership and Management	Supervisory skills, team leadership, and strategic thinking	Employees identified as high-potential for management roles
Soft Skills	Presentation, negotiation, conflict resolution, and feedback delivery	All employees, especially those in client-facing or cross-functional roles
Culture and Inclusion	Team collaboration, company values, and cultural competencies	All employees, particularly new hires and those joining offshore teams
Cross-Functional Exposure	Project rotation, shadowing, or stretch assignments to broaden perspective	Employees preparing for senior or leadership roles

Types of Training to Consider

Employee	Training Type	Program / Activity	Start Date	Completion Date	Application in Role



FRAMEWORK 01

Leadership Potential Competencies

This framework outlines the Leadership Potential competency list and behavioral guideposts to help assess the leadership landscape and identify the future leaders of the organization.

How to Use This Framework

Step	Action
1	Identify the critical roles in the organization. These are leadership posts or specialized roles that have direct and significant impact on the direction, sustainability, and continuity of the business.
2	From 1 to 5, with 5 being the highest, identify the target level of competency for each role.
3	Assess leaders, potential successors, and high-potential and high-performing employees against the competencies set for their current and target (future) roles.
4	Use the results to understand where capable future leaders exist, where the leadership pool is weak, what competencies the organization is strong at, and what needs to be developed. Define an action plan to develop people to reach target competencies.

Leadership Levels: What Each Requires

Level	Focus
Managers and Senior Managers (Manager of Other Managers)	Oversee teams or departments, requiring strong leadership, advanced problem-solving, and the ability to align team objectives with organizational goals. Focus on optimizing processes, driving performance, and managing resources effectively.
Directors	Operate at a strategic level, shaping organizational vision, fostering cross-functional collaboration, and influencing key business decisions. Responsible for long-term planning, driving cultural change, and ensuring all support functions align with the overarching business strategy.





Competency Definitions and Behavioral Expectations

No.	Competency	Definition	Manager / Senior Manager	Director
1	Communication Skills	The ability to influence and effectively convey ideas, information, and feedback in both written and verbal form.	Leads presentations to larger groups and stakeholders. Manages communication during organizational changes or crises. Influences the right stakeholders. Navigates conflict to achieve win-win resolutions.	Shapes and articulates the strategic communication vision. Influences and negotiates with senior stakeholders and external partners.
2	Emotional Intelligence	The ability to be self-aware, understand, manage, and navigate both one's own emotions and those of others to foster productive relationships.	Guides teams through emotional and high-stress situations. Implements strategies to enhance team morale and cohesion.	Cultivates an emotionally intelligent organizational culture. Leads high-stakes negotiations and manages executive-level relationships.
3	Problem-Solving and Critical Thinking	The ability to analyze situations, break down problems, identify root causes, and design and implement practical solutions.	Approaches issues systematically and leads problem-solving initiatives across teams. Creates and implements corrective and long-term solutions with significant operational impact.	Approaches issues to identify strategic challenges and develops long-term solutions. Drives organizational change through advanced critical thinking.
4	Business Acumen	Understanding of business operations and the ability to apply that knowledge to decision-making and strategy.	Aligns team objectives with broader business goals. Makes decisions that positively impact the organization's financial health.	Shapes business strategy based on comprehensive market and financial analysis. Drives initiatives that enhance overall business performance.
5	Stakeholder Management	Building, maintaining, and influencing positive relationships with key stakeholders.	Strategically manages stakeholder relationships. Negotiates and resolves conflicts between different stakeholder interests.	Influences and engages with top-tier stakeholders including executives and external partners. Develops long-term strategies for stakeholder engagement.



Competency Definitions and Behavioral Expectations

No.	Competency	Definition	Manager / Senior Manager	Director
6	Data Literacy and Analytical Skills	The ability to understand, interpret, and act on data to drive decisions and strategies.	Analyzes complex datasets to drive strategic decisions. Integrates data-driven insights into team and departmental strategies.	Oversees organizational data strategies and governance. Utilizes advanced analytics to shape long-term business strategies.
7	Collaboration and Cross-Functional Teamwork	Working effectively with colleagues across different teams and departments.	Promotes a collaborative culture and breaks down silos. Coordinates large-scale projects involving multiple departments.	Drives strategic partnerships and alliances across and outside the organization. Fosters an environment of continuous collaboration and innovation.
8	Project and Risk Management	The ability to plan, execute, and manage projects to ensure timely and successful delivery.	Leads multiple projects, optimizing resource allocation and efficiency. Ensures projects deliver desired outcomes and align with strategic goals.	Oversees a portfolio of projects, aligning them with long-term business strategies. Implements project management frameworks and best practices across the organization.
9	Customer-Centric Mindset	Placing the customer, whether internal or external, at the center of decision-making and service delivery.	Implements customer-centric policies and practices across the organization. Measures and reports on customer satisfaction metrics.	Shapes the organization's customer-centric culture and strategy. Drives initiatives that significantly enhance overall customer satisfaction and loyalty.
10	Leadership and People Development	The ability to lead teams, inspire performance, and mentor others for growth and development.	Coaches and develops team members. Creates opportunities for the team to grow, aligning their growth with organizational needs. Leads by example.	Drives the development of leadership pipelines and succession planning. Shapes organizational culture and leads large-scale people development initiatives.



Competency Definitions and Behavioral Expectations

No.	Competency	Definition	Manager / Senior Manager	Director
11	Institutional Mindset	The ability to manifest a big picture understanding of the work and the business and translate it to clear implementation details.	Sets team goals in conjunction with other teams to ensure alignment across the organization and drive contributions to the organizational goal.	Envisions the future for the business and translates this into an achievable plan of action.
12	Execution	The ability to deliver on commitment. The will and resolve to get things done and move closer to a goal.	Demonstrates ability to deliver results and exceed expectations in spite of ambiguity and limited resources.	Transforms vision into an action plan and empowers the team and the organization to follow through and deliver, contributing to the achievement of organizational goals.





FRAMEWORK 02

Capability Benchmarking Template

Use this template to assess team members against their current career level requirements and the next level requirements. Conduct this assessment quarterly and use the results to drive IDP updates and promotion decisions.

Instructions

Step	Action
1	Fill out the necessary requirements (fields) for each career level based on business need. Examples are provided but should be updated to reflect your organization's specific needs.
2	Assess each team member against their respective level based on performance, skills, and contributions.
3	Conduct quarterly performance reviews to discuss career goals and development plans against current and next level requirements.
4	Employees who meet the criteria for the next career level may be eligible for promotion, depending on business need and available roles.

Capability Benchmarking Grid

Criteria	Consultant	Senior Consultant	Principal Consultant	Solutions Architect
Job Description				
Qualifications				
Behavioral Indicators	Works independently with minimal supervision. Leads major projects and collaborates with other teams. Coaches and mentors junior consultants.	Works independently. Leads high-stakes conversations and major projects. Has deep understanding of the business. Strong stakeholder management. Identifies opportunities to create business value for clients.	Identifies risks and opportunities and creates strategies to create business value for clients. Identifies and influences the right stakeholders for win-win outcomes. Strong business acumen. Translates vision to actionable next steps.	All Principal Consultant behaviors, plus: strong collaboration across different units and levels, coaches and mentors other team members, shares best practices and conducts training as needed.



Criteria	Consultant	Senior Consultant	Principal Consultant	Solutions Architect
Years of Experience	1 to 5 years	4 to 7 years	6 to 10 years	8 or more years
NetSuite Skills				
Assessment (Support vs Lead)				
Scoping				
Pre-Sales				
NetSuite Certification	NS Administrator, NS Financial, User/ERP Consultant or equivalent	NS Administrator, NS Financial, User/ERP Consultant or equivalent	NS Administrator, NS Financial, NS/User/ERP Consultant or equivalent, NS SuiteAnalytics	NS Administrator, NS Financial, NS/User/ERP Consultant or equivalent, NS SuiteAnalytics
Celigo Skills				
Celigo Certification		Level 2	Level 4	Level 4
Special Certifications			NS PBCS, NS AR, NS AW, CPQ	NS PBCS, NS AR, NS AW, CPQ





Capability Assessment Score Sheet

Use this to score each employee against the competencies for their current role and the next level. Rating scale: 1 (not yet demonstrated), 2 (developing), 3 (meets level), 4 (exceeds level), 5 (ready for next level).

Competency	Current Level Target	Employee Score	Next Level Target	Gap
Communication Skills				
Emotional Intelligence				
Problem-Solving and Critical Thinking				
Business Acumen				
Stakeholder Management				
Data Literacy				
Collaboration				
Project and Risk Management				
Customer-Centric Mindset				
Leadership and People Development				
Institutional Mindset				
Execution				

Overall Assessment Summary and Recommendation:



MANAGER GUIDE

Manager Actions and Guidance

Career development does not happen without intentional manager action. These are the things you need to do consistently, not just when it is review season.

What Managers Should Do Consistently

Action	When	Why It Matters
Create and update IDPs for each employee	Initiated at annual review, updated quarterly	Provides a documented development roadmap that employees can track and managers can reference.
Set annual and monthly goals collaboratively	Start of year, then monthly	Keeps development connected to performance expectations throughout the year.
Conduct quarterly career check-ins	Every quarter	Ensures the IDP stays relevant and reflects current aspirations and business needs.
Recognize achievements and milestones	Ongoing	Reinforces motivation and signals that growth is being noticed.
Use the team roadmap for stretch assignments	When planning projects or resource allocation	Connects day-to-day work to long-term development in a meaningful, practical way.
Identify high-potential employees	During talent reviews and annual calibration	Prepares the organization for succession and builds a leadership bench.
Document career conversations	After every career discussion	Creates a record that supports transparency, consistency, and defensible promotion decisions.



Manager Self-Check: Career Development

- Does every employee on my team have a current IDP?
- Have I had a dedicated career conversation with each employee in the past quarter?
- Do I know what each employee's short and long-term career goals are?
- Have I connected development goals to actual work assignments?
- Have I identified which employees are ready to grow into higher-level roles?
- Have I documented career discussions?
- Have I recognized growth and progress, not just performance?

Career development is one of the strongest retention levers a manager has. When employees see a path forward, they stay. When they do not, they leave, even if everything else is fine.



Quick Reference: Career Management Tools

Tool	When to Use
Individual Development Plan (IDP)	Initiated at annual review. Updated continuously in coaching sessions.
Team Career Development Plan	Built at the start of the year. Reviewed quarterly.
Training and Development Tracker	Ongoing. Updated when training is assigned and completed.
Leadership Potential Competencies	During talent reviews and calibration sessions.
Capability Benchmarking Template	Quarterly. Assess current level and readiness for the next level.
Capability Assessment Score Sheet	During talent reviews. Feeds into promotion and succession decisions.
Career and Performance Timeline	At the start of each year. Use to plan career conversations across the year.

The Filipino Offshore Leadership System

Module 01 | The Filipino Offshore Leadership System

Module 02 | The Employee Relationship Cycle

Module 03 | Onboarding and the First 6 Months

Module 04 | Performance Management

Module 05 | Employee Engagement

Module 07 | Total Rewards and Compensation

Module 08 | Employee Relations & Labor Management

Module 09 | Offboarding in the Philippines





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