

Career assessment recap

Career snapshot and direction | Facilitator completes and confirms with the client

Client name

Session date

Facilitator

Notes source

Primary career and leadership goal

Strengths and supporting examples

Interests, values, and practical requirements

Readiness, leadership habits, and gaps to address

Primary direction, alternative, and evidence or test still needed

Priorities and actions

Choose three priorities | Give each action a clear owner and measure

Priority 1 and why it matters

Action for priority 1

Owner

Due date

Success measure

Priority 2 and why it matters

Action for priority 2

Owner

Due date

Success measure

Priority 3 and why it matters

Action for priority 3

Owner

Due date

Success measure

Your 30 60 90 day roadmap

Sequence the actions | Review evidence and adjust when needed

First move within 7 days

By day 30

By day 60

By day 90

Fallback or test if the primary direction does not fit

Review date

Read-back confirmed by and on

AI and recording consent status

Recap delivery date and method