

Self-audit

Introduction

This self-audit guide is designed to help you assess 'where you are now.' It can be used in the design stage of a learning plan, or to help you review where you are at the end of the programme. It can be used at any stage in your career, or it can be applied to a business or other venture.

The audit is divided into seven sections. In sections 1-5 the questions are arranged in left- and right-hand columns; the left-hand column asks you to list skills, opportunities etc., while the right-hand column asks further questions about what you have listed. You may find it useful to use a similar layout on paper or on a word-processed document to record your audit.

1. Strengths

What strengths and abilities do you have? Think about:

- skills and abilities
- knowledge and expertise
- contacts, networks and relationships
- other resources you have available or have access to

Are any of these under-used?

Do they suggest areas that you could build on?

2. Opportunities

What opportunities are there for you to develop?
For instance:

- jobs you could do or opportunities to learn where you work now
- your organisation's future plans
- changes in the industry you work in
- wider career or business opportunities
- opportunities you could create

How do these opportunities match your current strengths?

Do any of them suggest new things you need to learn or be able to do, or other strengths you need to develop?

3. Aims and aspirations

Do you have any aims or aspirations? It may help to think about:

- immediate or short-term aims, e.g. in your current workplace
- longer-term aims that are fairly concrete
- longer-term aspirations

What do you need to achieve them?

Do you need to develop any new strengths, skills etc., or gain access to additional resources?

4. Obstacles

Are there any barriers to your aims and aspirations, or blocks to taking advantage of opportunities? Think about:

- barriers that involve your competence or confidence
- external barriers caused by for instance finance, other people, your organisation
- uncertainties - where you are unsure about what will happen

What do you need to overcome them?

These could be skills, confidence, knowledge etc., support from others, or additional resources. Think of more than one way to overcome your obstacles.

5. Problems

What problems or threats are you facing? For instance:

- changes that you feel you have no control over
- things you are not competent or confident to deal with
- frustrations

Are there any abilities or resources that would help you face or overcome these problems?

Do any of them suggest areas where you could create new opportunities?

6. Areas for development

Having gone through sections 1-5, use your answers to the questions in the right-hand columns to identify areas for further development.

7. Action plan

The final stage is to draw up an action plan for developing the areas you have identified. If you are developing a learning plan, this will form your action plan, or part of it. If you have a company employee development plan or a continuing professional development plan, you might think about using that to support your action plan.

Examples

Below are two examples of self-audits. Both examples are summarised; the original audits would contain more detail and depth.

Jim

Jim works in the parts department of a car importer and distributor. He is 44, has a technician qualification and previously worked as a car and motorcycle mechanic.

Strengths

Identifies his main strengths as solving problems on the spot, being good with people, good at making contacts and getting others to help. He also feels he has a good knowledge of the industry at a practical level, and gets on well with dealers. He feels his skills in 'liaising and fixing' are under-used and his role is too low-profile.

Opportunities

The company wants to improve the way it works with dealers and needs staff who are good at dealing with people and sorting problems quickly. This fits well with his current skills, but he feels better knowledge of IT and intranet services will be needed. He gets on well with the new parts manager who has a positive attitude towards staff development and training.

Aims and aspirations

Jim sees the next step as being a management or possibly dealer relations role in his company or in a similar organisation. He feels he has most of the skills needed for this role, 'although doing a management course might help me put it over better and get the job at interview.'

Obstacles

The main barrier he identifies is that despite his skills he is not perceived as 'management material' in his firm, and he needs to be more active in convincing the senior managers that he is serious about getting promotion. As well as understanding his manager's role better, he feels taking an external course would help prove his commitment; however, there is another obstacle in that the company doesn't normally support management training for non-managers.

Problems

Changes in the company are likely to be positive, but central depot staff will be reduced and there is a chance he could lose his job. This has made him start scanning job advertisements, although he doesn't want to make a voluntary move immediately.

Areas for development

He identifies:

- formal management development
- a better knowledge of the parts manager's job
- improving ICT skills and understanding how the dealer intranet works

Action plan

Jim's action plan includes:

- exploring the options available for management courses that he can do without needing time off work, aiming to enrol by this autumn
- job shadowing his manager within the next six months
- getting up to speed on the company IT systems and the intranet
- applying for manager / supervisor roles in other companies and aiming for at least two interviews for the experience
- getting a management job within two years.

Bernadette

Bernadette has recently started work in graphic design and publicity for a supplier of building materials. She is 29 and has 2 A-levels and an HNC. She has previously worked in page layout and design for a magazine and has recently returned to work full-time after a 2-year break.

Strengths

She sees her main strength as graphic design; being able to take an idea and turn it into something that's visually attractive. She also feels she is energetic and a good communicator and has good computer skills. She thinks some of the work she is doing isn't particularly exciting from the design viewpoint.

Opportunities

She recognises two main areas of opportunity: design work for small companies, and freelance work for magazines and journals. Her basic skills match well with these although she needs better knowledge of the small companies market, and (if she is to work freelance) better computer equipment.

Aims and aspirations

Her immediate aim is to consolidate her skills in her current job, but she would like to start her own business within two or three years. She needs better equipment, more knowledge about starting and running a small business and more contacts in small companies as potential clients.

Obstacles

Bernadette sees the main barriers as being lack of business experience and contacts and lack of equipment. She feels she can get work to tide her over as a designer with magazines, and build up experience and contacts as she goes along. She also needs to ensure that she has time for her young daughter.

Problems

None other than some frustration with some aspects of the work not being challenging enough.

Areas for development

Immediately, to consolidate her skills and make sure she is up-to-date, both in her current job and through keeping in touch with wider developments in her industry.

In the medium term, to develop business contacts and more knowledge of running a small business.

Action plan

Within 6 months: to develop her skills through work and enhance her knowledge through reading and contact with other designers to the point where she feels she can use leading-edge ideas.

Six to 12 months: to learn more about business start-up and running a small business through a mixture of on-line materials, possibly one or two courses if there is anything on that's relevant, and talking to others who have recently started up; to build up contacts, both in magazines and small and medium-sized businesses, mainly via friends and former colleagues.

Twelve to 18 months: to invest in up-to-date computer equipment and software with a target date of starting 18 months from the present.

Further Guidance

A Learning through Work support document is also available on **reflecting on your experience**.

If you have access to the LtW on-line resources you may find it helpful to look at **Enhancing Your Personal Effectiveness**.