Modèle Opcalia – 05/2019

Entretien professionnel

**Document préparatoire à destination du responsable / manager**

**L’entretien professionnel, de quoi s’agit-il ?**

Il s’agit d’un échange avec un collaborateur sur sa situation professionnelle actuelle et future au sein ou à l’extérieur de l’entreprise permettant notamment d’identifier ses perspectives d’évolution et son projet professionnel.

Obligatoire depuis la loi du 5 mars 2014, l’entretien professionnel conduit à la mise en place d’actions concrètes en matière de formation ou de professionnalisation du salarié.

En l’absence d’accord collectif prévoyant une périodicité différente, l’entretien professionnel doit avoir lieu tous les 2 ans. Indépendamment de cette périodicité, l’entretien professionnel doit également être systématiquement proposé au salarié qui reprend son activité à l’issue de certaines absences telles que le congé de maternité, le congé parental d’éducation …

Un entretien professionnel n’est pas un entretien d’évaluation. Le premier est tourné vers les projets d’évolution du salarié. Le second concerne l’appréciation des résultats du travail du salarié.

Ainsi, la fixation et l’évaluation d’objectifs, la négociation salariale et l’évaluation des résultats ne sont pas l’objet de l’entretien professionnel.

L’entretien professionnel est l’occasion pour le salarié de :

* faire le point sur ses activités,
* échanger sur ses attentes et ses besoins en lien avec son évolution professionnelle ou la sécurisation de son parcours professionnel,
* déterminer les actions à mettre en œuvre en vue de la réalisation de ce projet,
* s’informer sur les modalités d’accès à la formation professionnelle.

Lors de cet entretien, le salarié doit recevoir des informations relatives à la validation des acquis de l'expérience, à l'activation par le salarié de son compte personnel de formation, aux abondements de ce compte que l'employeur est susceptible de financer et au conseil en évolution professionnelle.

## Question clés à se poser pour préparer l’entretien

* Ai-je clairement informé le salarié des objectifs de l’entretien ?
* Quels documents dois-je remettre au salarié ?
* Combien de temps va nécessiter l’entretien ? Comment va t-il se dérouler ?
* Ai-je à ma disposition les informations ou les documents pour répondre aux questions qui se posent sur :
* **Le poste actuel du salarié** (documents utiles : fiche de poste, entretien professionnel précédent, récapitulatif des formations suivies par le collaborateur)
* **Les perspectives d’évolution professionnelles du salarié** (documents utiles : fiches de postes, stratégie de l’entreprise, plan de développement des compétences, ...)
  + dans l’entreprise : Quelle évolution dans l’entreprise ? Vers quel poste ? Compétences à développer ? Quelle formation envisager ? Selon quelles modalités ? Autres actions envisagées?
  + hors de l’entreprise : dans le groupe ou hors périmètre groupe ?
* **L’entreprise** : quels sont les principaux projets de l’entreprise ? Vont-ils avoir une incidence sur le poste actuel ou futur du salarié? Quels apprentissages ou formations faut-il développer

?

* **Sur les dispositifs de formation** : Est-ce que je sais en quoi consiste le Compte Personnel de Formation (CPF) ? Une reconversion ou une promotion suite à une formation en alternance (Pro-A) ? Suis-je en mesure d’expliquer les dispositifs de bilan de compétences, de Validation des Acquis de l’Expérience (VAE), le conseil en évolution professionnelle ? Si besoin, je me rapproche du responsable formation ou je consulte le site opcalia.com
* **Sur le traitement en interne des entretiens** (documents utiles : plan de développement des compétences, priorités de l’entreprise et des branches,...) Est-ce que je suis en mesure de répondre aux salariés s’il m’interroge sur le processus d’exploitation des résultats de cet entretien, notamment le processus de traitement des demandes de formation ?

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Entretien professionnel

**Document préparatoire à destination du Responsable / Manager**

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| **Date de l’entretien : \_ \_ /\_ \_ / \_ \_ \_ \_** | **Documents**  **ressources** |
| **Nature de l’entretien :** |  |
| □ Entretien périodique |  |
| □ Entretien proposé au (à la) salarié(e) reprenant son activité |  |
| (maternité, maladie…) |  |
| **Personne chargée de l’entretien :** |  |
| Nom : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Prénom : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ | - *Contrat de travail* |
| Poste occupé : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ | *- Fiche de poste* |
| Lien hiérarchique avec le salarié : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ | *- Convention*  *collective* |
| **Salarié :** |  |
| Nom : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Prénom : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Date d’entrée dans l’entreprise : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Intitulé du poste actuel occupé : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Date de prise du poste actuel occupé : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Classification : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Service : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Responsable hiérarchique : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Nature du contrat de travail : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| Durée du travail : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |

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| **Informations transmises par l’employeur**   * Le salarié a été informé sur la validation des acquis de l'expérience. * Le salarié a été informé sur l'activation de son compte personnel de formation. * Le salarié a été informé sur les modalités d’abondements de ce compte personnel de formation. * Le salarié a été informé sur le conseil en évolution professionnelle. | **Documents ressources** |
| Documents fournis par le responsable formation ou disponibles sur le site opcalia.com |

**Bilan de la période écoulée**

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| **Précédent entretien professionnel :**  **Date : \_ \_ / \_ \_ / \_ \_ \_ \_**  **Nature de l’entretien :**   * Entretien périodique * Entretien proposé au (à la) salarié(e) reprenant son activité (maternité, maladie…) | **Documents ressources** |
| *Contrat de travail, Fiche de poste, Convention* |
|  | *collective* |
| **Nom et fonction de la personne chargée de l’entretien** :  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |
| **□ Pas d’entretien professionnel réalisé.**  Motif : \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ |  |

**Actions suivies depuis le dernier entretien professionnel :**

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| **Typologies** | **Intitulé** | **Dispositif mobilisé** | **Durée/date d’obtention** | **Néant** (préciser motif) |
| **Formation(s)** |  |  |  |  |
| **Certification(s) acquise(s) ou élément(s) de certification acquis par la formation ou une**  **VAE** |  |  |  |  |
| **Autre(s) action(s) menée(s) (ex : CEP) ou compétence(s) acquise(s)** |  |  |  |  |

*Documents ressources : Contrat de travail, Fiche de poste, Convention collective*

# Activité

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| **Activités du salarié :**  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ | **Exemples**  **de questions à poser** |
| *Décrivez vos activités.*  *Etes-vous à l’aise dans la réalisation des tâches qui vous sont confiées ?*  *Quels sont vos atouts ? Quelles difficultés rencontrez-vous ?*  *Qu’est-ce qui vous intéresse le plus ? Quelle partie de votre métier préférez-vous ?* |

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| **Faits marquants depuis le dernier entretien :**  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ | *Quelles évolutions ou quels changements depuis le dernier entretien ?*  *Quelles difficultés avez-vous ren- contrées ?* |
| **Intérêts/motivations :**  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ | *Quelles sont vos sources de satisfaction/d’insatisfaction ? Quelles sont vos motivations* |

**Perspectives d'évolution professionnelle du salarié**

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| A cette étape, le chargé d’entretien doit recueillir le | **Exemples** |
| projet professionnel du salarié et le mettre en | **de questions à poser** |
| perspective avec la politique RH, formation et | *Quelles évolutions envisagez-vous (par exemple : avoir plus de responsabilités, vous perfectionnez dans un domaine particulier, changer de métier ?) Est-ce que vous souhaitez développer vos compétences dans le poste que vous occupez ? Y a-t- il un autre poste que vous aimeriez occuper au sein de*  *l’entreprise ? Ou hors de l’entreprise ?* |
| économique de l’entreprise |
| **Projet d’évolution professionnelle :** |
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| **Atouts / freins :**  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ | *Quelles compétences devez-vous acquérir pour occuper ce nouveau poste ? Quels sont vos points forts pour les atteindre ? Quels sont vos points à améliorer ?* |

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| **Moyens à mobiliser dans le cadre de ce projet :**  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_ \_  \_ \_ \_ \_ \_ \_ \_ | *Comment pouvez-vous mettre en œuvre ce projet ? (modalités financières, organisation, congés divers,...)*  *Quelle formation pourrait convenir selon vous? (CIF, CPF,...) Quels moyens envisagez-vous autre que la formation ?* |

## Action(s) envisagée(s) dans le cadre de ce projet :

|  |  |  |  |
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|  | **Intitulé** | **Date prévisionnelle** | **Modalités** |
| **Actions de formation** |  |  |  |
| **Actions aboutissant à une certification ou des éléments de certification**  **(formation ou VAE)** |  |  |  |
| **Autres actions** |  |  |  |

*\* Autres actions : bilan de compétences, mobilité interne, période de mise en situation professionnelle, coaching, conseil en évolution professionnelle, aide à la création/reprise d’entreprise, autres…*