Post Planning Sessions

WHAT TO DO BETWEEN PERFORMANCE REVIEWS

Conversation Tips

Strategic Questions

- Are we focused on the correct tasks? Priorities?
- What could be your first step to achieving the project goal?
- How can I help you be more productive? More successful?

Problem Solve

- Work with your employee's ideas to help them overcome challenges

Express Gratitude

- Let employees know when they are doing well

Encourage & Continue the Conversation

- What do you expect to be the most challenging about your goals for this quarter?
- What support can the department provide for your that will help you reach these goals?
- What do you hope to achieve in our unit this year?
- How can I be a better manager for you?
- How often would you like to receive feedback?
- What would be a helpful agenda for our weekly one-on-one meetings?

Following Up

- Should take place after important performance conversations
- Send follow-up documentation in a timely manner
- Include the date of the actual meeting, what was discussed, and what the expectations are moving forward
- Important for documentation purposes both the employee and the unit the employee is in

📝 Documentation is Not a Bad Thing

- Both low and high performers should be documented
- Always room for improvement, even high performers

Documentation Examples:

- Making notes of any frequent errors
- Record of conversations or check-ins, to reference if discipline is needed
- Saving emails that praise the work your employee performed

Documentation of Behavior

- Focus on facts and observations, not opinions and personalities
- Specify – when describing the behavior you observed, including who, what, where, and when
- Ensure the description is nonjudgmental and nonbiased

Documentation of Change in Behavior Needed

- Be assertive rather than aggressive when describing what change needs to occur
- Explain the specific behavior you would like to see from your specific employee(s)

Documentation of Behavioral Impact

- Explain how the behavior impacts the customer, the employee, and the department
- It's also important to connect the impact to the University's mission and vision

Setting S.M.A.R.T. Goals

Specific, Measurable, Achievable, Relevant, and Timely

Goal Setting

- Make time to talk to your employee about their goals.
- Create and collaborate with your employee(s) when setting their goals
- Employees' involvement in the goal-setting process increases the likelihood of achieving those goals.

Creating S.M.A.R.T. Goals

S State specifically what you want to be accomplished. Ask who, what, when, where, and why questions.

M How will you measure and evaluate the extent to which the goal has been met?

A Ensure the goal is challenging yet within the employee's ability to achieve.

R How is the goal relevant to the employee's key responsibilities?
How is it aligned to the unit objectives?

T Set one or more target dates. Be sure to include deadlines and frequency of checkpoints.