

Tips for Managers- The Planning and Discussion Meeting



The yearly performance review is a great time for managers to check in with employees on goals and expectations. It is a time for growth and to increase trust. For many managers and employees it can also cause anxiety because they might not have the skills to engage in constructive dialogue and elicit feedback or have skills in coaching, active listening and questioning. Following are some tips for having these conversations.

- ***Be prepared-*** Constructive criticism is key for improvement and growth. It is vital to build a reciprocal, dependable and respectful community. Remember to focus on behaviors- not the person. Think about the meeting beforehand and what you are going to address.
- ***Keep goals SMART-***
 - Smart- actionable, concrete
 - Measurable- how much, how well, when
 - Achievable-within an employee's scope
 - Results-Focused- measures actual outputs- not activities
 - Time-Bound- set time frames to monitor progress and target dates
- ***When you have your meeting be sure to set the proper tone by the following:***
 - Demonstrate interest in the employee
 - Establish rapport and create trust
 - Inform the employee of the meeting objectives and the basic format so they know what to expect.
 - Question to identify the employee's needs by asking questions about them, their goals, and any obstacles that might be preventing them from achieving their goals.

- ***Be an active listener in the process***- acknowledge, sympathize, paraphrase and empathize. If needed ask follow up questions to gain clarification.
- ***When creating the plan of action*** start with a positive statement that establishes an open dialogue.
- ***State any concerns***, but involve the employee in the process. Many times the person closest to the problem has the solution.
- ***Develop a solution that incorporates SMART goals.***
- ***In order to gain a commitment to action***, it is important to confirm the employee's needs as you see it. This ensures that both of you are on the same page.
- ***Commitment to action should come from both parties*** ensuring there is accountability from both the manager and employee. In this step the future goals are being solidified and there is confirmation of commitment. The manager is reinforcing their belief in the future success of the employee ensuring that the door is open for open dialogue.

The performance review should flow as a natural conversation so do not feel the need to make sure you are addressing each of these steps in order. This conversation is a dialogue with the purpose of supporting the employee with whatever tools will help them achieve their goals. While most employees are still going to be anxious, if you refer to these steps and try to incorporate them into the performance review, it will become a more meaningful conversation that will produce greater results.