Effective 1 TO 1'S

EFFECTIVE MANAGERS KNOW THAT TO ACHIEVE EXCEPTIONAL RESULTS, WE MUST CREATE UNDIVIDED ATTENTION TIME WITH EACH OF OUR DIRECT REPORTS.

1. Get your team members to do most of the talking. Even though one-to-ones are two-way dialogue, we must proportionally spend more time asking questions than on giving information.

- Icebreakers: Icebreakers help transition people from whatever they were doing previously to focusing on this growth conversation with you.

- Relationship-Builders: These are more personal questions that simply show that you care about your teammate. Leadership is relationships.

2. Cheer on your employee's wins. Look for ways to celebrate the goals reached and improvements shown.

- Celebrate: Start with the positives. Ask them what progress they've made since you last met. You will get more of what you recognize.

3. Make them think about and own their performance and the team's performance. Ask them questions that make them self-evaluate for what can be done better and what systems need improvement or a better solution so that the organization can succeed even more.

- Evaluate: Find out if they are thinking about the right things. Anything worth doing is worth evaluating.

- Updates/Upcoming Priorities: Each direct report should be coming to you prepared to share how he/she is doing on "the main things" and any special/current company priorities (a standard update). "Don't listen to their words; watch their feet"

- Obstacles/Struggles/Heads-Up: This is where you ask about anything standing in the way of them getting their goals accomplished. No manager wants surprises and no caring manager wants to leave obstacles in the way of an employee's progress.

4. Begin moving them to the next level of performance. Every one-to-one is an opportunity to challenge them to keep moving out of their comfort zone.

- Leadership Development: Ask a question each time that makes him/her think about how they are influencing the team around/under them. "There is no success without successors."

- Goals: Review the individual growth plan that this team member is working toward. This time is dedicated to coaching them in one or two areas in greater detail, forming action plans to check up on next time.

The one-to-ones are meant to be a push and pull meeting where goals, complaints, and praises are heard and resolved.

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1 Year Goal

INDIVIDUAL DEVELOPMENT PLAN

1. GOAL SETTING

Describe your Goal: Remember that a goal needs to be specific, measurable, attainable, relevant to your job description, and time-dated.

Goal: _____

_____

Measurement: _____

_____

Who will determine: _____

_____

Deadline: _____

_____

How the above goal furthers your personal development _____

_____

_____

_____

_____

How the above goal furthers the goals of the company

_____

_____

_____

_____

2. IDENTIFYING CHALLENGES:

What are my personal challenges in meeting the above goal? _____

_____

_____

_____

_____

What are possible work environment challenges that might make it difficult to meet the above goal?

_____

_____

_____

_____

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1 Year Goal

INDIVIDUAL DEVELOPMENT PLAN

3. SUPPORT

List Education/Training needed to achieve the above goal: (If training is required, please list name of class, date of class, location and estimated cost)

_____

_____

_____

_____

List Books/Materials/Equipment need to achieve the above goal: (List and estimate cost)

_____

_____

_____

_____

_____

Changes in work assignments and/or schedules needed to meet goal: (If a change is needed, please describe)

_____

_____

_____

_____

_____

Support or action required from your Supervisor (and/or other member of the team/company):

_____

_____

_____

_____

_____

4. DESCRIBE HOW YOUR GOAL WILL BE MEASURED:

_____

_____

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_____

5. ACTION PLAN

Action _____

Due Date _____

Status _____

_____

_____

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_____

PERSONAL DEVELOPMENT

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Onboarding Plan

Before the first day

- Welcome letter after acceptance of the position, re-stating the culture priorities
- Welcome email the week before, anticipating their arrival, preparing them for the first day
- Ask for employee's favorites (beverage, hobby, color, etc.), to eventually customize recognition
- Ask for Leader's Users Guide (How to best work with me), learning your uniqueness
- Required reading assigned (to be completed within 60 days), around company values, to be able to talk the same language
- Business card ordered (to be ready for first day)—another place to display the values
- Logo swag (shirt/hat/mug/etc.) ordered (welcome gift to be ready for first day)

On the first day

- Welcome gift/door sign/favorite beverage ("first day survival kit")
- Office/supplies/computer ready to hit the ground running (email account set up, etc.), rolling out the red carpet
- In-person (90-minute) orientation meeting with organization's leader: to discuss:
    - Mission
    - Vision
    - Values/culture
    - History (booklet?)
    - Reminder of why the person was hired/the strengths seen in them
    - Key expectations/measurables
    - Most important internal/external customer pain points to work on first
    - Suggestions on who to connect to in the community—for support/collaboration
- Lunch with staff they'll most closely work alongside
- HR employment paperwork, and employee handbook to read/sign
- Staff procedure orientation (half-day):
    - Computer/password/email/phone
    - Copier
    - Keys/building/security information
    - Who to go to for what
    - Processes
    - Overview of software programs
    - Budget/spending authority/reimbursement forms
    - Public relations pieces
    - Roster of senior leadership/board members and contact information

After the first day

- Email to constituents, announcing/promoting the new hire; company web site updated
- PSA to local media, announcing the new hire
- Mentor ("retention champion") assigned for first 90 days
- Simple personal replenishment and professional development plan established for first 90 days
- What kind of monthly report requested to leader
- Team building with core team (since there is now a new dynamic)
- 1-to-1's with each senior leader/board member
- Encouraging note from a senior leader/board member
- "Probation" performance review at 90 days:
    - How well they are aligning to the company values/culture
    - How well they are meeting KPIs
    - What to give more attention to

      During this appointment, ask:
    - What still doesn't make sense?
    - Where could we as an organization be more efficient?
    - How would you re-design our processes?
    - What is a huge gap that needs us to strategize to solve?
- Financial Incentive/bonus within the first 120 days

Some thoughts on performance reviews

Reviews should be a part of comprehensive feedback system that includes dynamic job descriptions, goal-setting, and 1-to-1 ongoing coaching appointments through the year—forming the base for solid annual reviews.

Tell the employees about the performance review process well in advance of the review month. Show them the tools and corresponding standards off which they will be evaluated. No surprises.

With any system, specific/constructive narrative commendations and recommendations carry the most weight.

90-day evaluations for new employees

Self-evaluation done by each employee prior to the performance review, (give them on-the-job time to reflect) with questions that are important to the employer, demonstrating the priorities of the organization. Questions like, How would you describe what a WIN is in your role? What do you enjoy most/least about your role? What barriers prevented you from getting all your goals accomplished? How well did you assist your team get their goals accomplished? What are your long-term goals in this organization? What do you need most from your supervisor?

A concise **contribution report** can be attached to this self-evaluation, which lists the *major accomplishments* of the past year and what the employee did to *grow in their role*.

Performance expectation 1-3 rating on principal accountabilities (Need to Improve, OK, Excellent with a one-liner expectation for each item evaluated)

1 = less than expected for that performance review year (BASIC) (either not up to speed yet, had disciplinary action pertaining to that expectation, etc.) *Required to give specific examples of deficiencies

2 = met expectations (EFFECTIVE)

3 = more than expected (VERY EFFECTIVE) *Required to give specific examples of proactive behaviors – and coaching/expectations to get "above the line" (Messaging: *Things aren't going well in this area; I want you to succeed and will do everything I can to help you; for you to stay, here's what needs to happen; we're going to meet regularly to evaluate your progress; if you can't get there, we'll have to make a change*.)

Categories: Job description duties, leadership/initiative/problem-solving, teamwork, communication/interpersonal skills, knowledge, organization, flexibility…

Core values of the organization can also be evaluated, to drive them deep into the culture

Using a 5-level scale allows for more differentiation between employees (with 2 superior levels, 1 satisfactory, and 2 less-than-satisfactory levels).

Questions for supervisors to ponder: How is the organization better because this staff member is on the team? How has the mission/vision of the organization been advanced because this staff member is on the team? Does the staff member go the 2nd mile with his/her responsibilities? Does the staff member take the initiative to help other people on the team be successful? Knowing what you know, would you re-hire the person without reservations?

On "conversation day", the employee signs/dates that it has been reviewed with him/her. Employee may attach a statement that accompanies the review, for their file.

Feed-forward! After review: **Individual development plans, completed with job enrichment recommendations,** for the year ahead (done mutually with employee and supervisor)

Everyone gets a stretch goal made by the supervisor.

Consider quarterly reviews: less formal, more ongoing feedback

360-degree reviews are best when there is a strong culture of trust, where employees are confident that everyone has each other's best interests in mind. 360's give an orbital view of how the employees are perceived by those who they work with most often. Unfortunately, they can be divisive and destructive in a low-trust culture.