

MANAGER GOAL SETTING TO-DO LIST

Goal setting process overview

Step 1: Meet with each of your employees to have the goal setting & development planning conversation. Be sure they walk away with concrete & connected expectations for results & behaviours.

Step 2: Approve each employee's performance & development plans.

Goal setting discussion agenda template

Set a positive tone for the discussion. Be on time. Come out from behind your desk. Turn off your computer & phone. Eliminate distractions & interruptions. Ensure the discussion is two-way.

Discuss your employee's current expectations: results, job responsibilities / duties, goals, & required behaviours / competencies. Ensure they are concrete, provide clarity on your expectations for success. Communicate & demonstrate how your employee is connected to the big picture for your team.

Share your perspective of your employee's current strengths, skills & abilities. Discuss what is needed to succeed & be excellent with the current expectations. Share feedback about what your employee could be doing differently or better, based on your current expectations. These are short-term development needs.

Inquire into your employee's personal & professional aspirations, the things he / she wants to achieve in his / her career over the next 2 years. Encourage continuous learning, growing & stretching. This is their long-term development goal.

Clarify next steps including documentation / update & approval of their performance & development plans.

Summarise the conversation & express support for your employee's success.