

Personal Development. Manager Guide.

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Timings:

— To be done in preparation for the new year.

— Check in at half year on progress against objectives (approx. 6 months after the initial meeting).

— Note: feedback should be continuous/open as the year progresses. Any development issues shouldn't be saved up for the meetings.

Step-by-step guide

— Stage 1:

- Discussion on the core competencies of **[your business]** and targets for the year plus any other relevant information which may influence development plans.
- Manager is responsible for scheduling and leading this discussion with their team and direct reports.

— Stage 2:

- Both employee and manager to prepare in advance for the personal development meeting (Stage 3).
- Consider the competencies and targets when working through the prompt questions.
- Where relevant, the manager should consult with their own manager/others to gather additional feedback.

— Stage 3:

- Personal development meeting held between manager and employee.
- The onus will be on the employee to take ownership of their role and SMART objectives for the coming year. It is also a valuable opportunity for self reflection.
- The manager will also have opportunity to give additional feedback and set further objectives where they identify gaps.

— Stage 4:

- Meeting typed up and signed by both manager and employee. Keep copies.
- An additional meeting may be required before the template is finalised – this at the discretion of the manager and/or employee.
- Signed template to be scanned and sent to **[HR/Office Manager]** for filing.

Preparing for the meeting Manager

Use these questions to help focus your thoughts and reflect on the employee and their progress:

- What would you like to **get out** of the conversation?
- What **one message** would you like the other person to take away from the conversation?
- How would you **rate** their progress last year? *Why?*
- What were their **stand-out moments** of the year for you? *Why?*
- What didn't go so well? *Why?* What was the impact on the business/others?
- What would you like their **plans and goals** to be this year?
- What will **success** look like?
- If you could **change one thing** about their performance, what would it be? *Why* would it make a **difference**?
- What could you **do differently** as their manager? How would this help them?
- What else would you like them to be **involved** with? *Why?*
- How do you see their **career developing**? What help could you give them?

In the meeting

Come ready to...

- Listen
- Trust
- Remain open
- Encourage
- Ask questions
- Challenge
- Seek feedback
- Reflect

...and let the discussion flow...

In the meeting...if you get stuck Manager

Use these questions to help keep the conversation flowing:

– **Getting started...**

- Where do you want to start?
- How was last year?
- What would you most like to talk about?

– **Moving the conversation forward...**

- Looking ahead, what most excites you?
- What else would you like to talk about?
- How could you make that happen?
- What do you need from me?

– **Closing the conversation...**

- Have you got across everything you wanted to share?
- Was there anything else you wanted to talk about?
- Before we complete the summary is there anything else on your mind?

The meeting headline topics

Employee will document the discussion after the meeting

Previous year...

Topics to cover

- How was last year?
- Stand out moments?
- Low moments?
- What did you learn?

Next year...

Topics to cover

- Plans and goals?
- How will you achieve them?
- Think SMART!

Career development...

Topics to cover

- How would you like your career to develop or progress?
- What help do you need?

Summary: Manager's comments

Manager to take notes in the meeting and add to the employee's personal development template, once the employee has written up the previous sections.

Things to cover

— Considering the discussion so far, what else would you add to help the employee progress?

Date and sign off the employee's personal development template once you both agree it reflects the discussion and goals agreed for next year.