



Goaling Approach MANAGER FRAMEWORK

Guidelines:

In this directed one-on-one meeting format, you'll focus on clear, established goals related to the employee, department, and company.

Use this framework to guide you before, during, and after the meeting.





BEFORE

Prepare

Review your notes from your previous 1-on-1 with the employee. You'll need these to make observations regarding the progress towards the employee's goals.

Organize and document

Break out the goals of the employee, department, and company. Concisely state these as S.M.A.R.T. goals you can measure progress towards (Specific, Measurable, Achievable, Relevant, Timely). Plotting the progress (or lack of) toward each goal.

Preparation

- ❖ Find notes from your previous meeting
- ❖ Concisely document employee's individual performance goals
- ❖ Record department's key performance indicators
- ❖ Note overall company goals
- ❖ Measure any known progress towards each goal

DURING

Make the person comfortable

Find the right location and time to have a good conversation and keep the employee comfortable. The last thing you want is for this meeting to be hurried and be unproductive for everyone involved.

"How are you? How's your day looking? Before we start, is this meeting time conflicting with anything imperative happening?"

Quickly follow up

Track the weekly goals if they were met or not while taking note of challenges encountered by the employee. Record any new progress in the goaling spreadsheet.

Stay positive

What positives learnings can be seen from your goal tracking?

"I see you did (X) more efficiently to crush your goal this week. Someone mentioned you dedicated a lot of time to (Y). The team wouldn't have met the goal without that."

Keeping a high ratio (around 5:1) of positive to negative is important for building and maintaining trust and credibility during the meeting. Positives don't have to come off as compliments; you can simply state positive interactions that are contributing to goals.

Discuss challenges

Be careful not to frame these as "negatives" or "failures." This can derail the 1-on-1 into feeling accusatory or defensive. What challenges led to less-than-ideal performance towards a goal?



DURING, continued

"Did you understand the goal here? How can I help; can I take something off your plate? Do we need to make any process changes to help you tackle some of these goals?"

Set expectations

What goals can be updated or created for your next meeting? Discuss next steps and deliverable dates for these, then confirm when your next meeting is happening.

Additionally, ask the employee if he or she has thoughts on the department, team, or company's overall goals. Listen carefully to the feedback and reasoning here.

Goal-related action items

- ❖ Follow up and record numbers towards individual goals since previous 1-on-1
- ❖ Connect on a personal as well as business level
- ❖ Discuss positives seen towards goals
- ❖ Discuss challenges encountered with goals
- ❖ Discuss feedback concerning individual, department, and company goals
- ❖ Set expectations and deliverables towards goals before next meeting



NEXT STEPS

Make the person comfortable

If you've had a number of 1-on-1s without a "career" check in, consider one here. Do the employees enjoy what they're doing right now? Where do they see themselves in three to five years or more? Gauge if they seem fulfilled or happy. These meetings are an opportunity to connect on a personal as well as business level, adding trust to the manager- employee relationship.

Be sure to follow through

Execution is critical to maintain credibility. Schedule your next meeting as soon as possible. Plan and follow up on the goals discussed. Adjust goals as needed based on employee feedback. Hold both yourself and your employees accountable.

Following through

- ❖ Note goal progress discovered in meeting
- ❖ Follow up on feedback around existing goals
- ❖ Schedule follow-up meeting

Avoid these common mistakes in your meeting structure

- ❖ Focusing too heavily on positive or negative items
- ❖ Avoiding difficult performance conversations
- ❖ Delivering "compliment sandwiches"
- ❖ Asking too many yes or no questions
- ❖ Being accusatory or defensive
- ❖ Failing to build credibility or trust

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