# Performance Planning and Development Worksheet

**Position**: _____     **Employee**: _____     **Date**: _____

## A.  Define Great Performance Outcomes — For the Position

❶ *What is GREAT performance for this **position**?* What GREAT performance outcomes represent the *target* for the employee's positive contributions? Think in terms of how *great* performance in this position benefits customers, co-workers, and the company as a whole. ❷ How will the employee and you know that *great* performance is achieved for each stakeholder? Identify specific measures of success.

| ❶ Great Performance Outcomes | ❷ Measuring Great Performance |
|---|---|
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## B.  Identify the Essential Job Functions — Position and Employee

❶ *Describe the essential job functions for this **position**.* Identify 4 to 5 major job categories where this position contributes to *great* performance. *Examples*: develop a positive relationship with the customer, develop an annual budget, manage the work of others, and so forth.

❷ For each job function, develop 2 to 4 SMART performance expectations for this position.

❸ For the **employee**, identify whether each overall job function or specific SMART expectation is an area where the employee should **Maintain (M)** performance, **Improve (I)** performance, **Accept (A)** new responsibilities, or **Grow (G)** or enhance in this job function by moving it to a higher level of performance.

| ❶ Essential Job Functions | ❷ SMART Performance Expectations | ❸ M, I, A or G? |
|---|---|---|
| 1. |  |  |
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| 2. |  |  |
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| ❶ Essential Job Functions | ❷ SMART Performance Expectations | ❸ M, I, A or G? |
|---|---|---|
| 3. | | |
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| 4. | | |
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| 5. | | |
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## C.  Identify Organizational Responsibilities — Position and Employee

❶ *Describe the organizational responsibilities for this <u>position</u>*. Identify 2 to 3 responsibilities that are expected of *every* employee. *Examples*: follow work rules, display teamwork, attendance, courtesy toward customers, and respect for department equipment and property.

❷ For each organizational responsibility, identify 1 to 3 SMART performance expectations for this position.

❸ For the <u>**employee**</u>, identify whether each organizational responsibility or specific SMART expectation is an area where the employee should *Maintain* **(M)** performance, *Improve* **(I)** performance, *Accept* **(A)** new responsibilities, or *Grow* (**G**) or enhance in this organizational responsibility by moving it to a higher level of performance.

| ❶ Organizational Responsibilities | ❷ SMART Performance Expectations | ❸ M, I, A or G? |
|---|---|---|
| 1. | | |
| | | |
| | | |
| 2. | | |
| | | |
| | | |

| ❶ Organizational Responsibilities | ❷ SMART Performance Expectations | ❸ M, I, A or G? |
|---|---|---|
| 3. | | |
| | | |
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## D.   Define Performance Outcome Goals for the Coaching Conversation

*Develop performance maintenance, improvement, or development outcome goals for the employee.*
Identify the **highest value/highest priority** performance or responsibility expectation areas from Parts B and C in which you want the employee to <u>maintain</u> current performance, <u>improve</u> performance, <u>accept</u> new responsibilities, or <u>grow</u> the job to a new level. Identify the top 3 or 4 maintain, improve, accept, or growth goals. For each goal, define the:

❶ *Positive* behavior or outcome for the employee

❷ How the employee and you might measure the employee's success on this goal

❸ Potential factors that are currently limiting performance success (or may do so in the future) and actions that the employee and the organization can take to address these obstacles.

❹ Specific behaviors and actions that the employee will engage in that, when practiced, are likely to move the employee's performance closer to the goal.

| 1.    ❶ Positive Behavior or Outcome Goal | ❷ Performance Measure |
|---|---|
| | |
| ❸ Factors Limiting Performance Success | Actions to Address These Obstacles |
| | |

❹ Specific employee ***behaviors*** that will enable the performance goal to be achieved:

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

| 2.   ❶ Positive Behavior or Outcome Goal | ❷ Performance Measure |
|---|---|
| ❸ Factors Limiting Performance Success | Actions to Address These Obstacles |
|  |  |

❹ Specific employee *behaviors* that will enable the performance goal to be achieved:

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

| 3.   ❶ Positive Behavior or Outcome Goal | ❷ Performance Measure |
|---|---|
| ❸ Factors Limiting Performance Success | Actions to Address These Obstacles |
|  |  |

❹ Specific employee *behaviors* that will enable the performance goal to be achieved:

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

| 4.  ❶ Positive Behavior or Outcome Goal | ❷ Performance Measure |
|---|---|
|  |  |
| ❸ Factors Limiting Performance Success | Actions to Address These Obstacles |
|  |  |

❹ Specific employee **behaviors** that will enable the performance goal to be achieved:

a.  _____

b.  _____

c.  _____

d.  _____

e.  _____

f.  _____

## E.   Identify Process Goals for the Coaching Conversation

What *process* goals do you have for the upcoming performance coaching conversation with this employee? Do you want to **build ownership for performance**, **build greater commitment to the job/organization**, **strengthen the performance partnership**, or **identify system barriers and challenges**? ❶ Identify your performance coaching process goals and ❷ your strategy for addressing each goal during your coaching conversation with the employee.

| ❶ Process Goals | ❷ Strategy for Addressing this Goal in the Coaching Conversation |
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## F.   Support Employee Performance

*What specific actions might you and others take to support/enable the employee to achieve his or her performance improvement or growth goals?*  What guidance, training, tools, equipment, information, and so forth could you make available to enable the employee to be successful?

**Coaching/Supervisory/Organizational Actions to Support *Great* Performance**

❶

❷

❸

❹

## G.   Prepare for the Performance Coaching Conversation

*What actions will you take in advance to prepare for the performance coaching conversation?*  What performance analysis, root cause exploration, or data collection should be done in advance of the coaching conversation?  What feedback, information, or upper management support do you need in advance of the conversation?  What self-reflection/self-assessment questions will you ask the employee to consider prior to the session? Review the employee's performance log and performance portfolio for documentation on performance results.

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