Setting Goals and Reviewing Results

**Overview**

This course will show the positive effect of shifting the traditional role of planner and evaluator from the leader to a shared responsibility between leader and employee. This shift builds ownership with the employee and allows the leader to focus on coaching and developing throughout the performance cycle. Leaders will experience how to use effective (SMART) goals to help them and their employees track progress and fairly evaluate outcomes. A well-written performance plan is also a powerful tool for leaders to use when determining where to focus their development and coaching discussions with their employees.

**Target Audience**

Frontline leaders through mid-level managers

**Learning Objectives**

By the end of the workshop, participants will be able to:

- Ensure direct reports take a more active role in managing their performance.
- Manage performance on an ongoing basis while working within the organization’s time parameters for goal setting and performance reviews.
- Provide the ongoing coaching and feedback your direct reports need to achieve their goals.
- Increase your direct reports’ confidence and commitment to their own success.

**Competencies**

- Aligning Performance for Success

**Course Content**

- **Shared Ownership:** Learners share with a partner the insights they gained about themselves in their self-assessment when it comes to performance management. Facilitator introduces a performance cycle, roles and responsibilities and the recommended discussions
throughout the performance cycle.

- **SMART Performance Goals**: SMART goals are introduced. A video-based activity has learners identifying what can go wrong when goals are not SMART and how to avoid these situations. Leaders practice writing SMART goals and then a partner reviews and critiques the goals.

- **The Interaction Essentials and Performance Discussions**: The group discusses the importance of personal and practical needs when setting goals and reviewing results. Facilitator reviews the Interaction Essentials which is followed by an activity in which learners identify which Key Principles and Interaction Guidelines are most helpful in each type of discussion. Discussion Planner and Discussion Outline are introduced.

- **Setting Goals Skill Practice**: Facilitator explains the skill practice process with two roles – leader and direct report. A prepared skill practice is used by the learners to practice a challenging setting goals discussion with a partner.

- **Gathering Data**: Two types of performance data – behavioral and operational – is are introduced. Facilitator reviews the STAR format as a way of gathering behavioral data. A case study is used for leaders to analyze performance data and track the progress of a direct report.

- **Reviewing Results Skill Practice**: The case study continues in a positive model video of a leader using the Interaction Essentials and performance data in a performance review discussion. Learners participate in a challenging reviewing results skill practice.

- **Resources**: Leaders receive a Resource Kit for both them and their direct reports to use back on the job.

**Who Needs to Take This Course?**

1. Do your leaders struggle with the “human side” of the performance management process?
2. Do they fail to achieve the purpose of expectations discussions—understanding, alignment, and agreement?
3. Are leaders providing the feedback and support employees need to meet their objectives?
4. Do leaders spend too much time coaching for improvement because people aren’t committed to their performance plans?
**Format / Length of Course**  
Format: Classroom  
Length: 4 hours

**Cost**  
$60 per participant for materials

**Required**  
Coaching & Feedback Track

**Prerequisites**  
Feedback Essentials

**Related Workshops**  
- Adaptive Leadership  
- Coaching for Success

**Pre-Work Required?**  
Yes

**Manager Actions Required**  
**Pre-Class:**  
- Talk with your employee about strengths and developmental opportunities related to the competencies.  
- Relate the information from the course to their job specific responsibilities.  
- Ask the employee how they believe they will benefit from the workshop.

**Post-Class Support:**  
- Have a discussion with the employee about their impression of the workshop.  
- Help the employee identify situations where they can apply the course content.  
- Give the employee feedback about how they are demonstrating the behaviors