SETTING GOALS AND REVIEWING RESULTS

LEARNING FORMATS: CLASSROOM (onsite or public), VIRTUAL, & WEB COURSE

People are more engaged and strive for better results when they feel ownership of their work process and outcomes. Unfortunately, leaders fail to engage and reinforce this sense of ownership during performance management discussions.

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 employee ownership, 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.

DO YOU FACE ANY OF THESE ISSUES?

> Are leaders bearing all the responsibility for monitoring, collecting, and analyzing performance data?

> Do leaders spend too much time coaching for improvement due to employees' lack of commitment to a performance plan?

> Do employees go into performance reviews with a fear of the unknown?

PERFORMANCE OBJECTIVES

Helps leaders:

> 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.

PRIMARY COMPETENCY DEVELOPED

> Aligning Performance for Success
> Gaining Commitment

SECONDARY COMPETENCY DEVELOPED

> Building a Successful Team

COURSE OVERVIEW

> **Shared Ownership:** Learners share with a partner the insights they gained about themselves in their self-assessment-with respect 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 helps learners identifying what can go wrong when goals are not SMART, and how to avoid these situations. Leaders practice writing SMART goals; after 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, followed by an activity in which learners identify the Key Principles and Interaction Guidelines that 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 goal-setting discussion with a partner.

> **Gathering Data**: Two types of performance data-behavioral and operational-is 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 via 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.

VIDEO SEGMENT SUMMARY

> Three vignettes illustrate what can happen as a result of setting performance goals that don't meet the SMART criteria.

> A positive model of a leader is shown during a reviewing results discussion.

COURSE DETAILS

> **Target audience:** Informal, frontline and mid-level leaders.
> **State-fundable:** Yes (onsite and public only).
> **Course length:** 4 Hours (onsite); 3.5 hours (public); 3 hours (virtual), 2 hours (web).
> **Facilitator Certification:** Certified facilitator required.
> **Prerequisites:** Communicating for Leadership Success.
> **Optimal Group Size:** 8 to 16. 20 maximum.
> **Course Prep:** Yes. 15 minutes.
> **Notes:** Session 3 of 5 in the Leadership Academy. Suitable for all environments; however, a healthcare-specific version is available. Onsite training available in Spanish.

OTHER COURSES TO CONSIDER

> Coaching for Peak Performance / Advanced Coaching
> Developing Yourself and Others
> Addressing Poor Performance

TALENT DEVELOPMENT TIP: Consider providing this course to non-leaders too! It will give them perspective on their role as well as their leaders role in accountability.

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