

Performance Planning and Learning & Development Structured Conversation Guide

Grevillea Consultants Performance Planning Service



Version 2.00

Introduction

This resource helps supervisors and the people they supervise to have a structured conversation for planning and review purposes. The benefits of a structured conversation are that it:

- Reflects the **formal nature** of the performance planning process
- Provides a **simple framework** for comprehensively looking at important matters
- Enables participants to make **clear decisions** on common ground

Considerations

The formal performance review is not for raising new hot issues or surprising the participants. It is a joint planning meeting. Hot issues must be dealt with prior to the meeting and at the time of their occurrence. When in doubt, talk to your HR specialist.

Nor is the formal planning and review process a time for situational analysis, dealing with existing issues or conducting performance coaching. These activities belong elsewhere in the supervisor relationship. They are relevant in the formal planning and review process so realistic performance targets are set and developmental opportunities are included in the learning and development plan.

Evidence shows that the full value of the formal process is gained when there are:

- Quarterly formal progress meetings using the plan,
- Quarterly informal coaching/consultative meetings in-between the formal progress meetings,
- Frequent, weekly feedback about a current performance action.

Please note, the evidence also shows that positive feedback is the powerhouse driver for performance improvement.

How to use this guide

Using the guide adds value in two ways:

- **Preparation:** The review participants use the guide to reflect and gather data in readiness for their meeting.
- **Agenda Supplement:** The framework is used to supplement the organisation's prescribed formal meeting agenda to help participants ensure they consider all relevant factors.

Additional resources

The performance reflection is based on the *Performance Panel* framework. This framework enables discussions across a wide range of general factors that businesses and teams have to address. Each part of the panel has sub-frameworks, which are used for coaching and business planning purposes.



Feedback and Quality Improvement

This is a free tool available to all, not just our clients. Please help us make it more useful by sending us your suggested improvements. Suggestions can be sent to:

info@grevilleaconsultants.com.au

Structured Conversation Framework

Context

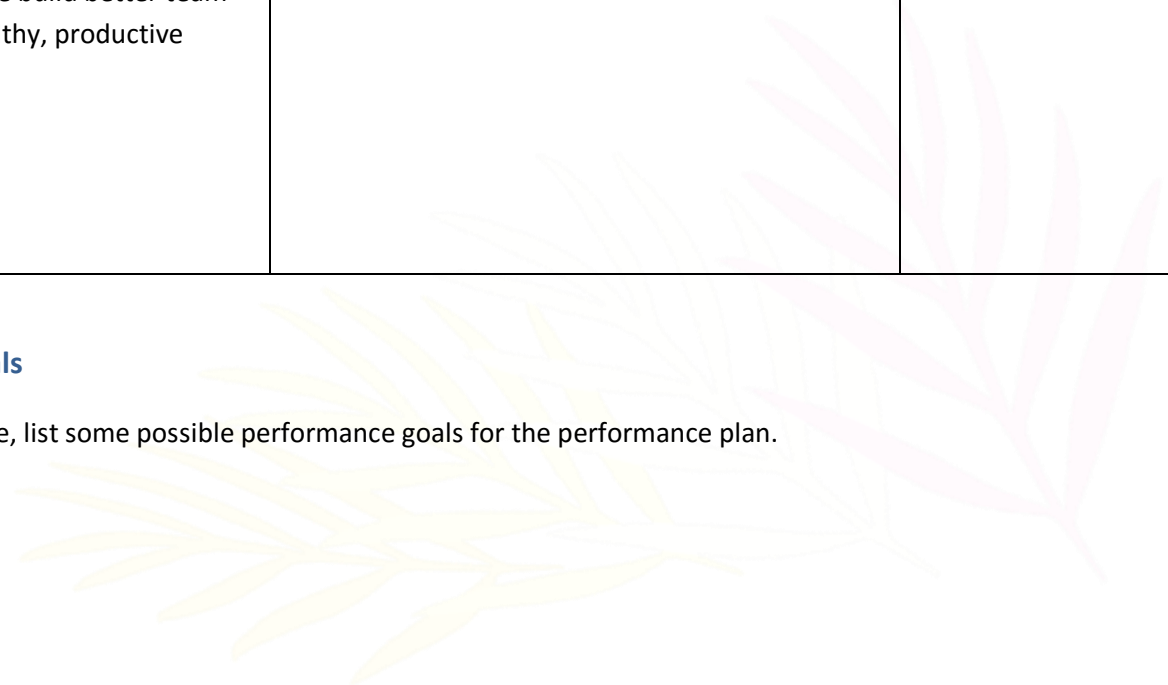
Agenda Item	Preparation Notes	Meeting Notes (Agreed relevance)
Priorities and Standards		
<p>Business Priorities: How do current and planned business priorities affect this role?</p>		
<p>Capabilities and Standards Frameworks: What elements of the organisation's capabilities framework, the profession's standards and/or the sector's standards are critical to this role?</p>		
Performance Reflection (Use the <i>Performance Panel</i> if deeper analysis is required)		
<p>Value: What value is this role creating for the organisation, team, customers? What value do they need from this role?</p>		

<p>Design: What could change in how this role does things to make it easier to keep creating this value?</p>		
<p>Engagement: What are the key relationships this role has to engage in to achieve its goals?</p>		
<p>Validation: How can this role demonstrate that it is providing value for stakeholders?</p>		
<p>Direction: What goals can this role set out to achieve in the next six or twelve months?</p>		

Production: What will have to be done to achieve these goals ?		
Integration: How can this role build better team work, cooperation and a healthy, productive culture?		

Possible Performance Goals

Based on the reflection above, list some possible performance goals for the performance plan.



Learning and Development - Gap Analysis

Starting with the performance goals but also considering business, personal and career goals, list current abilities and preferred abilities. The purpose is to identify gaps that could be addressed in the learning and development plan.

Goals	Current capability that contributes to achieving these goals	Preferred capability to contribute to achieving these goals
Performance Goals		
Business Goals		
Task Responsibilities		
Personal Performance Goals		
Career Goals		

Learning and Development - Priorities and Resources

Based on the gap analysis, select some learning and development priorities for the plan. For each of these priorities identify developmental avenues that will help develop them.

Learning Priorities	Supervisor Contribution	Peer Contribution	Experiential Contribution	Training Contribution.

Other Notes