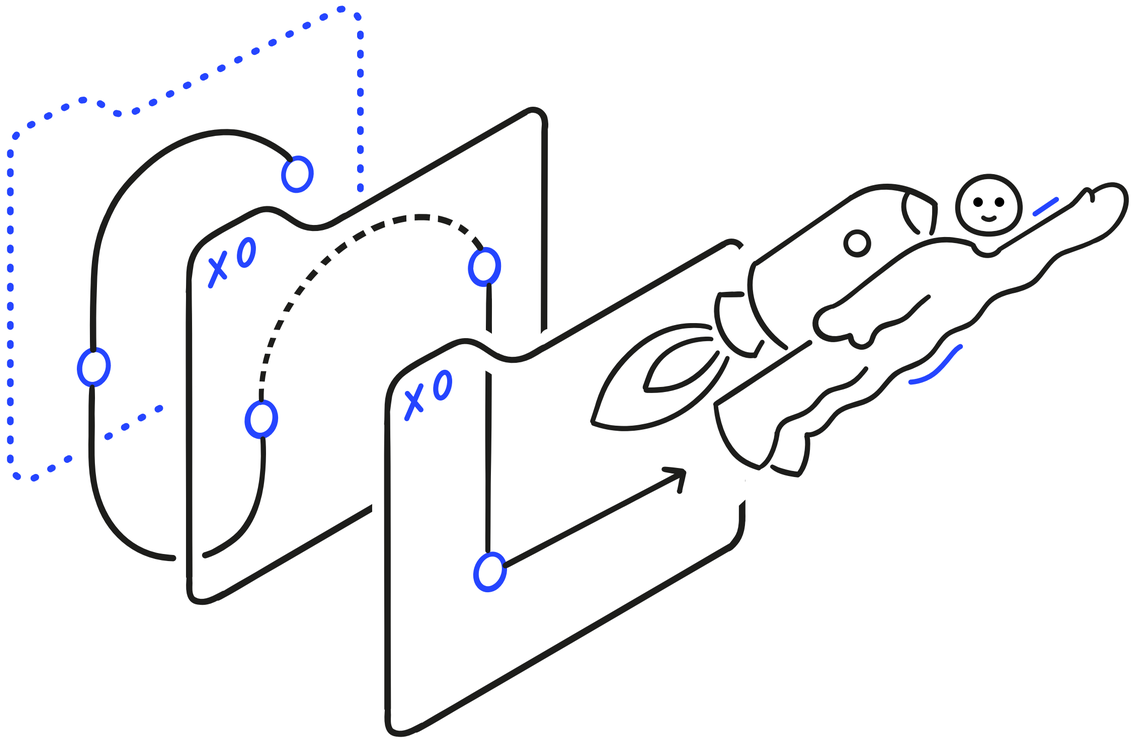
Starter pack

Agile performance management

Jumpstart your company's transition to agile performance management with this starter pack.



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HOW TO USE THE STARTER PACK:

1. Review the best practices to plan these important meetings with your direct reports.
2. Review the continuous performance cycles action plan and schedule performance checkpoints accordingly.
3. Pull talking points from the sample agendas to structure your conversations.
4. Use additional tools, including our goal-setting worksheet, to support your conversations.

Best practices

Agile performance management

Cadence and types of meetings	• Make conversations around performance a regular occurence. See our action plan below for a detailed agile performance management cycle timeline. • Bridge the gap between formal reviews (annually or bi-annually) with lighterweight performance check-ins (monthly). • Include complementary meetings (goal-setting, career development, poor performance, etc.) to your continuous performance cycles.
Preparation	• Gather both positive and constructive feedback you've received from other team members regarding their performance. Take note of your own feedback as well. • Look at their goal progress. See where they are excelling and where there are gaps. • Consider specific projects or tasks that exceeded, met, or did not meet expectations. • Review previous 1-on-1 meetings or performance checkpoint notes.
Approach	• Lead the conversation with empathy and genuine desire to help your team member grow, learn, and improve. • Provide coaching by sharing constructive feedback and guidance in a timely and actionable manner. • Recognize and reward good performance. Celebrate achievements and milestones, and always pass positive peer feedback along. • Nurture an environment where employees feel comfortable sharing their ideas, concerns, and feedback, and encourage them to do so. • If they're struggling personally, don't insist on sharing details. Depending on the context, you can reassure them the conversation stays between the two of you. • Listen actively and pay attention to non-verbal cues.
Follow-up	• Send a recap of takeaways and next steps after your meeting so your employee knows what to expect, and what is expected of them. • Add talking points on performance and review progress on action items in your lightweight check-ins. • Continue gathering and sharing feedback and recognition from other employees. • Keep track of progress. When dealing with underperformance, if you don't see improvement after a few conversations, it may be time to speak to HR for next steps.

Action plan

Continuous performance cycles

Performance checkpoints	Frequency	Talking points
New hire check-in *Sample agenda available below*	30 days after start date	• Make sure your employee is settling in well. • Clarify job responsibilities and expectations. • Discuss any initial questions or concerns they may have. • Set clear and SMART goals for the first 90 days.
Lightweight check-ins *Sample agenda available below*	Monthly	• Discuss progress on current projects and tasks. • Provide feedback on recent work and areas for improvement. • Recognize their achievements. • Discuss any issues or roadblocks they're facing.
Goal-setting discussions *Sample agenda + goal-setting worksheet template available below*	Every 3 to 6 months	• Discuss and identify personal development objectives for the quarter/next six months using the SMART goal-setting framework. • Discuss and identify goals tied to team and company objectives over the quarter/next six months using the OKR goal-setting framework.
Career development discussions *Sample agenda available below*	Every 6 months	• Check-in on the employee's satisfaction with their current role. • Ask the employee to share their strengths and aspirations. • Discuss potential career development opportunities. • Identify relevant training and learning opportunities.
Poor performance meeting *Sample agenda available below*	As needed *Schedule once you've spotted significant signs of poor performance for an extended period of time (4+ weeks)*	• Check-in on the employee's state of mind and well-being. • Respectfully address the signs of underperformance you've noticed. • Assess the resources and support they have access to and identify any gaps. • Set action items to help them improve in their role.
Formal reviews *Follow your company's formal review process. Use the talking points on the side for extra support.*	Every 3 to 6 months	• Review progress on goals set during the new hire check-in or their latest goal-setting meeting. • Review recent performance and provide feedback on strengths and areas for improvement. • Share positive and constructive feedback from their peers. • Discuss any recent challenges and successes. • Check-in on the employee's career goals and interests. • Identify any needs or resources that can better support them.
Annual performance recaps *Follow your company's formal review process. Use the talking points on the side for extra support.*	Annually	• Recap the main points from your performance chats throughout the year. Thanks to the previous steps in the action plan, these annual conversations will be leaner than before. • Review progress on the action items and goals set. • Share your highlights of the year. • Discuss salary increases according to your company's compensation policy.

30 DAYS AFTER START DATE

Sample agenda

New hire check-in

1

Check-in and context

(5-10 MINS)

- The first month on the job can be nerve-racking, so start with a quick check-in. Ask how they're doing, both professionally and personally.
- Follow up by expressing your intent and the purpose of this meeting and ease any jitters by clarifying that this isn't a formal performance evaluation.
  - For example: *"I booked this call to discuss your first month on the team. I want to make sure all is clear and that you have everything you need to succeed in your role."*
- Before moving on to your questions, give them a chance to ask any questions they may have about the meeting.

2

Recap of the first 30 days

(10 MINS)

- *Are your role and responsibilities clear? Are they what you expected when you joined the team?*
- *Have you met the teammates you will collaborate most with? Would you like me to introduce you to anyone?*
- *Have you struggled with anything this month (task, project, situation, etc.)?*
- *Do you have any feedback for the first 30 days of your onboarding? Was there anything we could have done better to get you up to speed?*

3

Looking ahead – next 90 days

(5-10 MINS)

- The first month on the job can be nerve-racking, so start with a quick check-in. Ask how they're doing, both professionally and personally.
- Follow up by expressing your intent and the purpose of this meeting and ease any jitters by clarifying that this isn't a formal performance evaluation.
  - For example: *"I booked this call to discuss your first month on the team. I want to make sure all is clear and that you have everything you need to succeed in your role."*
- Before moving on to your questions, give them a chance to ask any questions they may have about the meeting.

4

Wrap-up and action items

(15 MINS)

- A little recognition early on can lead to a whole lot of confidence. Wrap the meeting up by recognizing their efforts and first-month wins.
  - For example: *"You've been so autonomous and proactive from the start. I'm really impressed with how quickly you started taking your own projects on. Keep up the good work!"*
- Thank them for sharing feedback and quickly summarize the action items you noted for yourself.
- On their end, ask them to think about 2-3 small personal goals they'd like to achieve by the end of their first 90 days.

EVERY MONTH

Sample agenda

Lightweight check-in

1

Check-in and context
(5 MINS)

- *How's your day/week going?*
- *How have you been since our last 1-on-1?*
- Explain the purpose of this 1-on-1 meeting.
  - For example: *"Starting today, I'd love to dedicate one 1-on-1 per month to talk about how you're performing at work. My intention is to make conversations around performance easy and recurring so that I can continuously support you. These meetings are not evaluations, but they will help us both when it's time to have a formal review as we'll have a better idea of your progress throughout the year."*

2

Update on projects and tasks
(5-10 MINS)

- *How have you progressed on your projects since we last spoke?*
- *Do you have any flags, concerns, or challenges to raise?*

3

Performance check-in
(10-20 MINS)

- *How would you self-evaluate your performance this month? Would you consider yourself growing, performing, or thriving?*
- *What actions are you taking or want to start taking to reach your current goals?*
- *What projects/tasks are you excelling in? Which ones are more challenging and why?*
- *What kind of support do you need from myself and the team to perform at your best?*

4

Wrap-up
(5 MINS)

- Is there anything we haven't covered that you'd like to discuss?

EVERY 3 TO 6 MONTHS

Sample agenda

Goal-setting discussion

1 Check-in and context
(5-10 MINS)

- Start by checking in and asking how their day/week is going.
- Describe the purpose of the meeting.
  - *For example: I set this meeting up today so that we can collaboratively discuss your personal goals for the quarter/next six months. I'm here to help you brainstorm, align your goals to our team and organization's objectives, and make sure you have everything you need to achieve them.*
- Before moving on to your questions, give them a chance to ask any questions they may have about the meeting.

2 Review organizational and team goals
(5-10 MINS)

- New organization and team goals should be shared with the broader team, but it's important to give each employee a quick refresher during these individual goal-setting discussions.
- Give them the opportunity to ask any questions or address any concerns related to these goals.

3 Recap of previous goals, wins, and challenges (5-10 MINS)

- *What were your biggest accomplishments in the last quarter/year?*
- *What were the biggest challenges you faced and how did you overcome them?*

4 Goal-setting discussion
(15-30 MINS)

- *What would you like to achieve this quarter/year, based on our company objectives? We'll brainstorm together now, and you'll be able to expand on these goals further using our OKR goal-setting worksheet.*
- *What are some personal development objectives you'd like to achieve this year? I want you to think about SMART goals (specific, measurable, achievable, relevant, time-bound).*
- *What are the main areas or skills you need to improve to reach those goals?*
- *What resources do you need to achieve your goals? What do you already have access to, and what are you missing?*
- *What are the potential roadblocks or obstacles you may encounter, and how can you address them?*

5 Wrap-up and action items
(5 MINS)

- Thank them for their collaboration and ask them if they have any questions or concerns.
- Share next steps and brief them on how to formally document their goals.
  - For example: *As a next step, I would like you to narrow down your list of objectives and expand on them. I'll send you a worksheet after this call to help you outline your goals, how you'll measure them, how they contribute to our team goals, and what your action items are.*

EVERY MONTH

Worksheet

Employee goal-setting

Team member name: Date:

GOAL #1

E.g. By next month, I will test and launch a new marketing campaign.

Goal description
Describe your goal in more detail.

Link to team goals
How will this contribute to your team goal(s)?

Key results
What measurable outcomes will you need to achieve?

1.
2.
3.

Action items
What specific tasks will you need to complete?

1.
2.
3.

Start date:

End date:

GOAL #2

E.g. In the next quarter, I'll expand our repertoire of client case studies.

Goal description
Describe your goal in more detail.

Link to team goals
How will this contribute to your team goal(s)?

Key results
What measurable outcomes will you need to achieve?

1.
2.
3.

Action items
What specific tasks will you need to complete?

1.
2.
3.

Start date:

End date:

GOAL #3

E.g. This year, I'll solidify our brand's recognition and position as a leader in X industry.

Goal description
Describe your goal in more detail.

Link to team goals
How will this contribute to your team goal(s)?

Key results
What measurable outcomes will you need to achieve?

1.
2.
3.

Action items
What specific tasks will you need to complete?

1.
2.
3.

Start date:

End date:

SCHEDULE AS NEEDED

Sample agenda

Career development discussion

1

Discovery – where you're starting from (5-10 MINS)

- *Tell me about a time you accomplished something that you were really proud of.*
- *What are your strengths?*
- *What is some common feedback that you receive from others?*
- *Where are there gaps in your knowledge?*

2

Your career path – looking at the big picture (20 MINS)

- *Looking a few years down the road, what role do you see yourself playing at work? The more specific, the better.*
- *Thinking about the role you want in the future, what skills or competencies do you think you need to develop?*
- *What opportunities exist within our current team to help you move toward your career goals while also meeting the team's needs?*
- *What does success look like?*

3

Take action – next step planning (5 MINS)

- *What are three main personal development goals you can accomplish in the next 12 months to move you further in your development?*
- *What is one action that you want to take in the next week to move toward your long-term vision?*
- *What are 3 activities you can do this month to keep you progressing?*
- *How can I help you achieve your goals?*
- *Who else in the organization can support your efforts?*

SCHEDULE AS NEEDED

Sample agenda

One-on-one meeting to address poor performance

1 Context
(5-10 MINS)

- Start by expressing your intent and the purpose of this meeting.
  - For example: *"I'd love to discuss how things are going at work for you right now. My intent is to help and support you in any way possible so you can succeed and be happy."*
- Since these meetings don't happen regularly, be sure to give them context by carefully and respectfully mentioning some of the signs of underperformance you've picked up on.
- Don't forget to check in. Ask how they're doing, both professionally and personally. Personal issues can often cause poor performance, so it's important to have a full picture of your employee's well-being.
- Before moving on to your questions, give them a chance to ask any questions they may have about the meeting.

2 Performance discussion – employee-focused (10-20 MINS)

- *Do you feel the expectations of your role are clear? Are they realistic?*
- *In your own words, how would you describe your current responsibilities?*
- *Are there any changes that can be made to your role or responsibilities to help you perform better?*
- *Do you feel your work is important and has an impact?*
- *Are there any areas where you feel you need additional training or development?*
- *Are there any obstacles or challenges that prevent you from performing at your best?*
- *How would you describe your collaboration with other team members?*

3 Performance discussion – manager-focused (10-20 MINS)

- *Do you feel you have all the conditions you need to succeed?*
- *How can I better support you in achieving your goals?*
- *Do I give you enough time to work on your projects?*
- *Am I respectful of your timelines?*
- *Is there anything I can adapt in my management style to help you perform better?*

_____

_____

_____

_____

4 Wrap-up and action items
(5-10 MINS)

- *How are you feeling? I know this was a tougher conversation than usual, so thank you for chatting with me. I want to make sure we keep an open line of communication so that we can get through this together. At the end of the day, your success is my success.*
- *Let's set up action items so we can move forward more effectively. What do you want to set for yourself following this discussion?*
- *What are the most important things you'd like me to address on my end?*
- *Is there anything else you'd like to share or discuss that can help us work together more effectively?*