TEAM MEMBER PRE-WORK DOCUMENT

Development Discussion

An important opportunity for you to think about you - and your future focuses

This process (and the subsequent in-person conversation) follows a simple 6-step format:

1. How are you getting on?

A self evaluation of your current state of wellbeing, workplace enjoyment, workload and performance

2. Team player?

Considering your contribution to the collective performance of your team and broader business

3. Learning and developing?

Reviewing your progress in advancing & achieving your growth objectives

4. What help do you need?

Ensuring we minimise any potential barriers to success

5. How is my boss doing as a leader?

Feedback is a two way street - a chance to provide useful insight and help your leader grow.

6. Where to from here?

Identifying focuses for us to monitor and execute on going forward

MOST of the following questions are asked in a statement format, you just need to decide the level to which you agree or disagree using the 10-point scale provided.

1 = Totally Disagree 10 = Totally Agree

Just circle the number that best aligns with your perception.

If you WANT to give further context to support your selections, use the text spaces throughout to do so. Your written insights help paint a clearer picture of your opinions and perceptions, so please add your extra input where you feel comfortable to do so. It will likely make the following in-person conversation easier for both you and your boss!

Let's get started!

YOUR NAME	How are you getting on?	YOUR DIRECT REPORT

PERSONAL WELL-BEING

"From a general wellbeing perspective, I am content"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

WORKPLACE ENJOYMENT

"Our work environment is great"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

FAIR EXPECTATIONS

"The work I'm required to do daily is manageable"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

GENERAL PERFORMANCE

"If I were my boss, I would impressed by my performance"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

YOUR NAME	Team Player?	YOUR DIRECT REPORT

WIDER TEAM CONTRIBUTION

"I pitch in whenever possible"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

KNOWLEDGE SHARING

"I share my thoughts and experiences to help others"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

ROLE MODEL

"The way I behave, in and out of work, sets a good example"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

PERCEPTION OF OTHERS

"My teammates would describe me as a team-player"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

YOUR NAME	Learning & Developing?	YOUR DIRECT REPORT

What have been your development focuses recently / since our last meeting?:

Use these focuses as the basis for your following ratings…

ADVANCING MY GROWTH GOALS

"I have made good progress"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

ALIGNED OBJECTIVES

"Most of my goals have clear links to those of the business"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

SHOWING MY VALUE

"I am proud of the outcomes I've been able to deliver"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

ONWARDS AND UPWARDS

"I try to find new/better ways of doing things"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

YOUR NAME	What help do you need?	YOUR DIRECT REPORT

PRIORITISING MY TIME AND TASKS

"It is easy for me to know what jobs need to be done, by when, and in what order"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

WORKING SMARTER

"I have all the 'tools' I need to complete my work safely and successfully"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

KICKING GOALS

"I have clear targets that help me know if I am meeting expectations"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

PERSONAL RECOGNITION

"My boss gives me plenty of encouragement and recognises when I do a good job"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

YOUR NAME	Feedback for my boss?	YOUR DIRECT REPORT

COMMUNICATION

"My boss keeps me in the loop with what's going on"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

ROLE MODEL

"My boss sets a good example"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

ON-JOB TRAINING

"My boss helps me build the skills that make my workload easier to manage"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

PROBLEM-SOLVING

"My boss helps to resolve issues in a calm and supportive way"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Optional - Further explanation and/or evidence:

YOUR NAME	Where to from here?	YOUR DIRECT REPORT

These will be confirmed in your 1:1 conversation, but, based on everything you've noted to this point, what do believe could be some viable focuses for us to monitor going forward?

Try and provide a minimum of 3 and ensure at least 2 of those are focuses for you personally:

#1 ACTION/GOAL/TARGET: _____

#2 ACTION/GOAL/TARGET: _____

#3 ACTION/GOAL/TARGET: _____

#4 ACTION/GOAL/TARGET: _____

#5 ACTION/GOAL/TARGET: _____

THANK YOU FOR YOUR TIME & EFFORT!

TEAM LEADER PRE-WORK DOCUMENT

Development Discussion

An opportunity to co-evaluate your people - and their future focuses!

This process (and the subsequent in-person conversation) follows a simple 6-step format:

1. How are they getting on?

An evaluation of their current state of wellbeing, workplace enjoyment, workload and performance

2. Team player?

Considering their contribution to the collective performance of your team and broader business

3. Learning and developing?

Reviewing their progress in advancing & achieving their growth objectives

4. What help do they need?

Ensuring we minimise any potential barriers to success

5. How am I doing as a leader?

Feedback is a two way street - a chance to provide useful insight and help you grow as a leader.

6. Where to from here?

Identifying focuses for us to monitor and execute on going forward

IMPORTANT: DON'T review your team members' responses until you have completed this task!
Doing so will likely alter your responses and reduce the effectiveness of this process.

MOST of the following questions are asked in a statement format, you just need to decide the level to which you agree or disagree using the 10-point scale provided.

1 = Totally Disagree 10 = Totally Agree

Just circle the number that best aligns with your perception.

It is HIGHLY recommended you give further context to support your selections, use the text spaces throughout to do so. Your written insights help paint a clearer picture of your opinions and perceptions. It will likely make the following in-person conversation easier to navigate/facilitate.

Let's get started!

YOUR NAME	How are they getting on?	YOUR DIRECT REPORT

PERSONAL WELL-BEING

"From a well-being perspective, they appear to be content"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

WORKPLACE ENJOYMENT

"They are a great contributor to our work environment"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

FAIR EXPECTATIONS

"The work they're required to do daily is manageable"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

GENERAL PERFORMANCE

"I am impressed by their performance"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

YOUR NAME	Team player?	YOUR DIRECT REPORT

WIDER TEAM CONTRIBUTION

"They pitch in whenever possible"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

KNOWLEDGE SHARING

"They share their thoughts and experiences to help others"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

ROLE MODEL

"The way they behave, in and out of work, sets a good example"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

PERCEPTION OF OTHERS

"Their teammates would describe them as a team-player"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

YOUR NAME	Learning and developing?	YOUR DIRECT REPORT

What have their development focuses been recently / since our last meeting?

Use these focuses as the basis for your following ratings…

ADVANCING MY GROWTH GOALS

"They have made good progress"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

ALIGNED OBJECTIVES

"Most of their personal goals have clear links to our business goals"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

SHOWING MY VALUE

"They should be proud of the outcomes they've been able to deliver"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

ONWARDS AND UPWARDS

"They continually find new/better ways of doing things"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

YOUR NAME	What help do they need?	YOUR DIRECT REPORT

PRIORITISING MY TIME AND TASKS

"It appears easy for them to know what jobs need to be done, by when, and in what order"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

WORKING SMARTER

"They have all the 'tools' needed to complete their work safely and successfully"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

KICKING GOALS

"They have clear targets that help them know if they're meeting expectations"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

PERSONAL RECOGNITION

"They're given plenty of encouragement and recognised when they do a good job"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

YOUR NAME	How am I doing as a leader?	YOUR DIRECT REPORT

COMMUNICATION

"I keep them in the loop with what's going on"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

ROLE MODEL

"I set a good example for my team"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

ON-JOB TRAINING

"I help them build the skills that make their workload easier to manage"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

PROBLEM-SOLVING

"I help to resolve issues in a calm and supportive way"

	1	2	3	4	5	6	7	8	9	10	
Totally Disagree											Totally Agree

Further explanation and/or evidence:

YOUR NAME	Where to from here?	YOUR DIRECT REPORT

These will be confirmed in your 1:1 conversation, but, based on everything you've noted to this point, what do believe could be some viable focuses for us to monitor going forward?

Try and provide a minimum of 3 and ensure at least 2 of those are exclusively for the team member:

#1 ACTION/GOAL/TARGET: _____

#2 ACTION/GOAL/TARGET: _____

#3 ACTION/GOAL/TARGET: _____

#4 ACTION/GOAL/TARGET: _____

#5 ACTION/GOAL/TARGET: _____

NOW YOU CAN COMPARE & CONTRAST YOUR INSIGHTS WITH THOSE OF YOUR DIRECT REPORT!