

Planning and Results Conversation Tool

Employee Name: Click or tap here to enter your name.	Conversation Frequency: Click or tap to select frequency
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Planning Conversation

Instructions: Complete prior to the planning conversation with your leader. After the conversation, finalize the information and provide your leader with a copy of the plan.

1. What does success look like in this position?	
Click or tap here to enter text.	
2. What will I achieve to be successful in this position?	
Click or tap here to enter text.	
3. What career development activities will I accomplish (IDP*)?	
Click or tap here to enter text.	
4. What support do I need?	
Click or tap here to enter text.	
Date of Planning Conversation:	Click or tap to enter date of your conversation.

Results Conversation

Instructions: Complete prior to the results conversation with your leader. After the conversation, finalize the information and provide your leader with a copy of the results.

1. What did I achieve in my position?	
Click or tap here to enter text.	
2. What career development activities did I accomplish (IDP*)?	
Click or tap here to enter text.	
3. What went well?	
Click or tap here to enter text.	
4. What were my challenges?	
Click or tap here to enter text.	
5. What would I have done differently? What are my takeaways?	
Click or tap here to enter text.	
6. Moving forward, what support do I need?	
Click or tap here to enter text.	
Date of Results Conversation:	Click or tap to enter date of your conversation.

*An Individual Development Plan (IDP) is optional for all employees.

Conversation Considerations

For the Employee

When developing your plan, consider the following:

- What success looks like for the position, not for me personally?
- Does my plan support strategic goals and business objectives?
- What is a realistic timeframe for accomplishing my plan?
- What activities are on my Individual Development Plan (IDP*) that I can accomplish during this timeframe?
- How will I monitor my progress to ensure I stay on track?
- How/when will I provide updates to my leader during the plan timeframe?
- What details should be included in my plan to ensure the expectations are clear?
- What are potential challenges and what assistance would I need?

When completing the results portion, consider the following:

- What do I need to do better next time or to continue my development? Training?
- What feedback can I provide to my leader regarding the support provided?

For the Leader

Below are some talking points you may use as a guide during your conversation with the employee. You may take notes during the conversation for future reference. After the conversations, the employee should provide you with the finalized plan and results.

Planning Conversation:

- Success in this position means.....
- Areas you should focus on.....
- Career goals you may want to consider (IDP*).....
- How can I support you?

Results Conversation:

- What went well?
- What didn't go well?
- What is one takeaway from your career development activities? How will you apply this in your current position?
- Going forward, how could you mitigate those challenges?
- Additional areas of opportunity....
- Start....., Continue....., Stop.....
- What feedback do you have for me

**An Individual Development Plan (IDP) is optional for all employees.*