Drive Engagement by Assessing Progress Against Development Goals

The Importance of Following Up on Goals
Periodic assessment of progress on development goals ensures plans are achievable, which can impact employee potential by up to 37.8%.

Before Discussion—Review the Goals Themselves (and Have Employees do the Same)

Review Goals to Ensure They Still Meet the SMART Criteria—The first step to ensuring periodic progress on goals is to have well-written goals that are easy for follow up. Well-written goals not only make it easier to assess progress, but also increase the probability of making a development plan more achievable. While reviewing goals before the progress discussion, assess the goals written previously to check if they continue to meet the SMART criteria; specifically, focus on determining whether the goals continue to be attainable and relevant, or if they need to be modified based on the employee’s progress and the team’s goals.

Assess Progress Periodically
Although there is no standard frequency for assessing progress on goals, managers and employees should aim to have at least one to two check-in meetings before the due date of each goal.

During Discussion—Discuss Progress Against Goals
Prepare for Progress Discussion Meetings—The objective of check-in meetings is to assess the relevance and achievability of the goals determined previously. During the meeting, managers and employees should focus on assessing the relevance of goals themselves, and then evaluate employees’ progress against those goals. To ensure that these check-in meetings are productive, both managers and employees should come well-prepared to these sessions; managers should ask their direct reports to outline the following information prior to coming in for a progress discussion meeting:

- Steps taken to achieve objectives
- Milestones achieved
- Problems/roadblocks encountered
- Updated timeline estimates
- Additional support needed
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Checklist for Discussing Progress on Development Goals

Before the Meeting
✓ Do I have periodic meetings scheduled with my direct report to discuss development progress?
✓ Have I reviewed the development plan prior to the meeting?
✓ Do I have any examples of my direct report’s performance against his/her goals?

During the Meeting
✓ Are any existing goals redundant based on achieved development objectives?
✓ Have any existing goals become more/less relevant or more/less achievable?
✓ Are there any new goals that should be included in the plan? Consider the following while determining inclusion of new goals:
  - Employee’s recent performance highlighting any new development areas that have arisen and need immediate attention
  - New role responsibilities for the employee
  - Changes in organization/team needs
✓ Are my coaching efforts aligned with my employees development goals?
✓ Did my direct report complete any action steps from their IDP?
✓ Has my direct report demonstrated any of the success measures listed in their IDP?
✓ Do any of the goals, milestones, action steps, and/or timelines need to be adjusted?

Common Progress Assessment Pitfalls

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<tr>
<th>Common Pitfalls</th>
<th>Solution</th>
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<tr>
<td>Assess progress only during the formal reviews</td>
<td>Assess progress periodically by having interim check-in meetings</td>
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<td>Lack of concrete examples of the employee’s progress against goals</td>
<td>Track progress on goals by keeping a record of employee’s performance against development objectives</td>
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<td>Absence of candid feedback</td>
<td>Encourage a productive conversation by communicating that the discussion will be development-oriented and should not be mistaken for a performance evaluation conversation. After setting these expectations, ensure that you provide specific and constructive feedback.</td>
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<td>Over-focus on education-based development activities to achieve development objectives</td>
<td>Ensure that up to 80% of development activities are on-the-job learning, as it makes the development plan more achievable. Employees can best build the skills they need by focusing on the work experiences and assignments that are most closely tied to their performance objectives.</td>
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