
ANNUAL GOALS & DEVELOPMENT PLANNING MANAGER TOOLKIT

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Guiding Principles

- To engage all members in candid, respectful coaching conversations about how to continue improving individual and collective performance
- To learn to value and effectively use feedback as a powerful learning tool for personal and professional development and growth
- To build high-trust working relationships at individual and team levels across the organization
- To align individual goals with the strategic goals and mission of the University

Manager Responsibilities

- Communicate the unit / department priorities and goals to employees, relate to organizational strategy
- Review the unit / team contributions as well as individual contributions
- Support employees in establishing SMART goals and expectations with the participation of employees
- Communicate throughout the year about employees' goals, performance and development
- Recognizing and rewarding successes and identifying coaching moments to offer support and help employees address any challenges that may emerge
- Ensure employees have the tools, resources, and training and development plan needed to carry out their work successfully

Manager Preparation Essentials

- Always schedule meetings in advance that are mutually convenient for both you and the employee
- Be sure there is enough time allotted and that it will be free from interruptions
- Arrange meetings with care – ensure locations are private for confidentiality
- Invite employees to prepare and share self-reviews
- Reference relevant documentation before meeting with employees to recall established goals and accomplishments
- Consider the employee's responsibilities when setting goals, what he/she has done well and where improvement may be needed; what you are doing and what you can improve to support the employee
- Give yourself time to review employee's self-assessment and consider any feedback received from others
- Prepare your review before meeting with the employee

The ANNUAL GOALS & INDIVIDUAL DEVELOPMENT CYCLE – ROLES & CONVERSATION GUIDELINES

STAGE	EMPLOYEE	MANAGER
<p>MAY – JUNE Year End Annual Goals & IDP Discussions</p>	<ul style="list-style-type: none"> • Conduct a self-review for year-end meeting share prior to meeting with manager • Acknowledge successes, provide specifics on impact and added value, on learning opportunities • Be open about unmet goals and challenges • Be receptive to manager’s feedback; discuss underlying cause(s) and preventative actions going forward • If disagreement occurs do so respectfully and focus on the facts 	<ul style="list-style-type: none"> • Refer to Past Annual Goals documents and any additional progress notes that have been recorded • Review and prefer specific feedback highlighting past year • Offer feedback on employee’s self-review • Recognize successes and describe the positive impact and contribution – be specific • Provide specific examples of the above while remaining supportive • Thank employee for contribution and efforts
<p>JUNE Annual Goals Discussions For Coming Year</p>	<ul style="list-style-type: none"> • Draft annual goals for coming year • Ensure alignment with unit / department priorities and organizational strategy • Review goals against SMART criteria • Review available support and resources • Consider strengths, interests, motivators • Link development plan to goals • Discuss ideas for learning opportunities with manager • Consider the various resources available 	<ul style="list-style-type: none"> • Invite employee to draft annual goals for coming year • Review for alignment with unit / department priorities and organizational strategy • Consider how goals relate to individual workload, interests and capabilities – is there sufficient stretch? • Assess strengths and areas of development with each employee • Ask what support you can provide employee • Encourage employee to explore development options
<p>JUNE – JULY Review IDP Plans & Hold Discussions</p>	<ul style="list-style-type: none"> • Actively explore learning opportunities and share with manager – take ownership of your learning • Consider your learning preferences, aptitudes • Explore multiple ways to support development • Track learning progress 	<ul style="list-style-type: none"> • Review employee development plan and offer suggestions if applicable and finalize • Coordinate any resources to support development • Offer encouragement and support along the way

<p>Ongoing Touch Point Meetings & On-the-spot Coaching</p>	<ul style="list-style-type: none"> • Seek out coaching as needed and offer informal updates • Apply new learning along the way • Self-monitor progress and development activities • Note any changes to unit/department priorities and impact on goals • Share any challenges along the way and resolve • Brief touch points in-person, by phone or email 	<ul style="list-style-type: none"> • Encourage staff member input • Listen and respond realistically • Acknowledge good performance through feedback • Coach in the moment by offering feedback, recognition, improvement, problem solving • Brief touch points in-person, by phone or email
<p>JANUARY Mid-Year Annual Goals & IDP Discussions</p>	<ul style="list-style-type: none"> • Review and share accomplishments to date • Share any challenges or issues being experienced • Explain what may be causing the problem • Think about how to resolve the issue, and share your ideas about resources and assistance that you identified • Share changes pertaining to goals and be adaptive. Your willingness to revise goals demonstrates your support in contributing toward department priorities. Review revised goals against SMART criteria and confirm • Report updates on your development plan: accomplishments to date, changes, application of new learning, any revisions • Solicit feedback from manager to reset goals accordingly 	<ul style="list-style-type: none"> • Schedule meeting in advance to prepare • Set a positive tone for discussion • Provide a brief update on organizational and team progress; share any changes that may affect individual goals • Ask employee to share his/her perspective • Provide direction and feedback • Listen to employee suggestions and discuss and verify against SMART criteria, and confirm goal revisions • Ask about development plan accomplishments and offer feedback; adjust and identify f/up steps • Recognize successful milestones and continue to encourage and support
<p>Ongoing Touch Point Meetings & On-the-Spot Coaching</p>	<ul style="list-style-type: none"> • Seek out coaching and informal update opportunities • Apply new learning along the way • Self-monitor progress and development activities • Note any changes to unit/department priorities and impact on goals • Share any challenges along the way and resolve • Brief touch points in-person, by phone or email 	<ul style="list-style-type: none"> • Encourage staff member input • Listen and respond • Acknowledge effort and successes • Coach in the moment by offering feedback, recognition, improvement. problem solving • Brief touch points in-person, by phone or email

Goals May Change & Need to Be Revised During the 12-month Cycle.

Unforeseen circumstances can occur and these challenges may directly impact whether or not you can achieve your goals. Some of these circumstances may include: a change in the University's strategic plan or direction, shifting priorities for the department, a change in job responsibilities and duties, resources are no longer available or you are unable to complete goals due to impact on others.

Should any of these or other changes occur take a proactive approach to scheduling a meeting with your manager and review and revise goals accordingly to ensure that you are progressing toward achieving your goals and objectives with success.

SET S.M.A.R.T. GOALS

Well-constructed annual goals clearly define the desired end results of an employee's work and how success will be measured. They build a foundation for effective coaching conversations, mid and year-end reviews and development planning. The year-end review is based on the contribution to the achievement of these strategies. Those efforts are assessed by the impact on the department objectives.

Specific (and Strategic):

- Does the goal clearly define expectations in terms of actions and outcomes?
- Does the goal avoid generalities and use action verbs?

Measurable:

- Is the goal results-based?
- Does the goal define specific metrics (quantity, quality, timeliness, cost, etc.) that can be objectively measured?

Achievable:

- Is the goal challenging, but within reason?
- Does the employee have the skills and experiences necessary to achieve the goal?
- Is achievement of the goal within the employee's control?
- Can the employee reasonably be expected to successfully complete the number of goals assigned to him/her?

Relevant:

- Is the scope of the goals appropriate given the employee's job responsibilities and level?
- Does the goal clearly connect to departmental and / or organizational goals?
- Does the employee understand how his / her goal contributes to the unit / department and organization's objectives?

Time Frame:

- Does the goal specify a date or elapsed amount of time by when each goal needs to be completed?
- Setting and committing to specific, challenging goals can boost employee effort, focus, and performance. Aligning employee goals with the department and organization's objectives helps employee understand their value and how they contribute to the team and organization.

Create Goals That Are Challenging, Yet Achievable

The general guideline for developing goals is to do so within the scope of an employee's job description and skill level, with enough of a stretch to challenge and further develop the individual. Keep it attainable within the time frame given.

ESTABLISHING MUTUAL TRUST & RESPECT IN WORK RELATIONSHIPS

Mutual trust and respect strengthens every relationship. Both develop as a result of many small actions over time. We can build trust one step at a time through consistently demonstrated traits, communication and actions. To achieve mutual trust and respect, we need to hold ourselves and others accountable to the following:

- Bringing the best of oneself into the relationship – demonstrating integrity, open-mindedness, and honesty
- Conveying respect in every interaction regardless of the person or situation
- Taking responsibility for our words and actions – honouring commitments to others
- Recognizing and appreciating others' efforts
- Giving more than taking, while still keeping our own interests in view
- Helping others achieve their goals, or personal best
- Respecting where others are coming from – their knowledge, experience, thoughts, values, beliefs and needs

When we enter into new relationships or need to rebuild existing relationships, we can easily begin by establishing rapport. Rapport ensures the relationship gets off to a good start and the following suggestions can help you do this:

Find Common Ground – Ask open-ended questions to learn about others' interests, hobbies, or similar beliefs and values.

Show Empathy – Understand and see things from others' perspectives, and recognize their emotions - get "on their level."

Use Mirroring - Adjust your own body language and spoken language so that you "reflect" that of the person you are talking to.

Apply Communication Basics – Face people and give eye contact, smile, be genuine, practice 2-way communication, be present.

When we approach relationships in this manner, we are all contributing to a workplace that fosters coaching conversations, team work and collaboration. Remember to check-in on your efforts – ask others how they perceive you and what impact you have on the relationship.

COACHING CONVERSATIONS

Coaching does not always need a formal structure to be effective, it does, however, need trust, patience, skilled questions and empathy.

COACHING IS A TWO-WAY PROCESS

Keep in mind the relationship between you and your employees will impact the coaching conversation.



- Listening without judgement
- Staying with the employee while listening to their needs
- Giving eye contact and full attention to the situation
- Allowing open-ended questions to draw out the knowledge from the individual
- Supporting employee to come to a decision
- Tapping into employee's own knowledge and skills
- Offering direction and feedback as needed

Coaching Conversations Can Support Staff in a Number of Ways

- Achieve and fulfill the requirements of their roles
- Provide direction, resources and support
- Guide and support another individual to achieve their goals
- Encourage learning and focus on areas for professional development
- Affirm achievements and progress
- Provide feedback and suggestions
- Build a positive environment
- Giving ongoing support
- Overcome barriers to success

The GROW Model - A Framework for Coaching Conversations

The model is a simple yet powerful framework for structuring a coaching conversation. It ensures conversations with employees are purposeful and focused. Using specific open ended and timely questions keeps the dialogue flowing and provides opportunity for your employee to share thoughts, ideas or solutions and plan actions. It also gives employees a chance to ask for your feedback. This framework supports 2-way dialogue. For more information on the GROW coaching model go to http://en.wikipedia.org/wiki/GROW_model

<p style="text-align: center;">GOAL  REALITY  OPTIONS  WILL </p>			
<p>Agree on the topic and specific objective of session; set long term aim if appropriate</p>	<p>Invite employee self-assessment; offer specific feedback with examples; AVOID or check any assumptions</p>	<p>Brainstorm options; invite suggestions from employee; offer suggestions carefully; ensure choices are made</p>	<p>Commit to action; identify any barriers and solutions; make steps specific with timelines; agree to support</p>
<p>Sample Questions What is the specific aim of this discussion? What would a milestone look like? What do you want to achieve by doing this? Is that positive, challenging, and attainable? How could you measure this as an outcome?</p>	<p>What is happening now? Who is involved? What is the effect on others? What have you done so far? What effect did this have? What do you feel is holding you back? What is really going on here? Is this a symptom or a cause?</p>	<p>What options do you have? What else could you do? What if....? (time, resources, influence) What are the costs and benefits of each option? What are the risks, if any, of doing this? What are the risks, if any, of doing nothing?</p>	<p>Which option do you choose? To what extent does this meet your objectives? What are your criteria for success? What support do you need and from whom? What precisely are you going to do - what steps? What could hinder you taking these steps?</p>
<p>Topic and specific objective for the conversation is clear.</p>	<p>Situation and experience reviewed and feedback provided.</p>	<p>Options are explored and options are selected.</p>	<p>Action plan and timeline is confirmed.</p>

COACHING CONVERSATION SKILLS

Effective Skills	Ineffective Skills
Listening	
<ul style="list-style-type: none"> <input type="checkbox"/> Paraphrases what employee has said to ensure clarity and understanding <input type="checkbox"/> Encourages, accepts, explores and reinforces the employee's expression of feelings, perceptions, concerns and beliefs <input type="checkbox"/> Allows the employee to vent or clear the situation without judgment or attachment to move on to the next steps <input type="checkbox"/> Allows for silence and short pauses 	<ul style="list-style-type: none"> <input type="checkbox"/> Interrupts, talks over the employee <input type="checkbox"/> Finishes the employee's thoughts <input type="checkbox"/> Appears distracted <input type="checkbox"/> Speaks more than listens <input type="checkbox"/> Doesn't refocus or redirect when employee is rambling <input type="checkbox"/> Seems to have an agenda or doesn't push to understand the employee's agenda
Questioning	
<ul style="list-style-type: none"> <input type="checkbox"/> Asks questions that reflect active listening and understanding of the employee's perspective <input type="checkbox"/> Asks questions that evoke discovery, insight, commitment or action, or that challenges the employee <input type="checkbox"/> Asks open-ended questions that create greater clarity, possibility or new learning (questions may begin with "how" or "what") <input type="checkbox"/> Asks questions that move the employee towards what they desire, not questions that ask the employee to justify or look backwards <input type="checkbox"/> Invokes inquiry for greater understanding, awareness and clarity <input type="checkbox"/> Asks clarifying questions in order to deepen employee's awareness or understanding; or asks a limited set of clarifying questions to ensure understanding <input type="checkbox"/> Refocuses and redirects the conversation when necessary 	<ul style="list-style-type: none"> <input type="checkbox"/> Asks questions about information the employee has already provided <input type="checkbox"/> Asks closed questions that have a yes/no answer or that narrow the conversation <input type="checkbox"/> Asks solutions-oriented questions (questions that have advice embedded within them) <input type="checkbox"/> Seeks the "One True Question" and allows awkward pauses <input type="checkbox"/> Asks rambling questions – a number of questions in a row without allowing the employee to respond to them <input type="checkbox"/> Asks questions that have 'right' or 'wrong' answers <input type="checkbox"/> Asks interpretive questions – questions that reflect the coach's interpretation of what was said <input type="checkbox"/> Asks rhetorical questions that may reflect judgment <input type="checkbox"/> Asks leading questions to suggest an answer <input type="checkbox"/> Asks "Why?" Questions

Giving Feedback	
<ul style="list-style-type: none"> <input type="checkbox"/> Feedback is clear and direct <input type="checkbox"/> Feedback is evidence-based <input type="checkbox"/> Uses appropriate and respectful language <input type="checkbox"/> Feedback is mostly facilitative – allows the employee to make his/her own learning <input type="checkbox"/> Appropriately uses humor to lighten tone of conversation <input type="checkbox"/> Feedback might challenge beliefs and assumptions 	<ul style="list-style-type: none"> <input type="checkbox"/> Feedback is based on opinion, coach's experiences <input type="checkbox"/> More than 2 pieces of critical feedback are given <input type="checkbox"/> Feedback is mostly instructive/directive <input type="checkbox"/> Moves employee to action quickly without employee owning action <input type="checkbox"/> Feedback reflects disrespect or biases <input type="checkbox"/> Allows inappropriate language to be used
Non-verbal Communication	
<ul style="list-style-type: none"> <input type="checkbox"/> Maintains eye contact the majority of the time <input type="checkbox"/> Arms and body relaxed and open <input type="checkbox"/> Nods head <input type="checkbox"/> Facial expression could reflect empathy, concern, understanding, caring 	<ul style="list-style-type: none"> <input type="checkbox"/> Little eye contact <input type="checkbox"/> Arms crossed <input type="checkbox"/> No cues to show listening <input type="checkbox"/> Facial expressions could reflect judgment, frustration or distraction

PROVIDING ONGOING FEEDBACK & COACHING – IT'S ALL ABOUT THE CONVERSATION!

Effective ongoing feedback and coaching engages managers and staff in candid interactive dialogue that helps build trusting relationships; develops employee skills, knowledge and abilities; and attains both individual and organizational goals. Feedback and coaching are critical elements of the University's annual goals and development planning cycle. Feedback can be provided on-the-spot or in a planned meeting. Regardless of when it is delivered it should always be timely, specific and supportive.

Following these simple steps ensure your feedback is received well and encourages development.

1. STATE THE PURPOSE OF YOUR FEEDBACK.

First, briefly state your purpose by indicating what you'd like to cover and why it's important. If you are initiating feedback, this focus gives the other person a heads up about how the conversation will go. If the other person has requested feedback, a focusing statement will make sure that you direct your feedback toward what the person needs. Remember to be clear and straight-to-the-point.

Examples: "I have a concern about." "I feel I need to let you know." "I want to discuss." "I have some thoughts about."

2. DESCRIBE SPECIFICALLY WHAT YOU HAVE OBSERVED.

You have a certain event or action in mind and say when and where it happened, who was involved, and what the results were. Stick to what you personally observed and don't try to speak for others. Avoid talking vaguely about what the person "always" or "usually" does.

Examples: "Yesterday afternoon, when you were speaking with customers, I noticed you were losing patience as you spoke." "Let's meet over a coffee to discuss what happened."

3. DESCRIBE YOUR REACTIONS.

Explain the consequences of the other person's behavior and how you feel about it. Then give examples of how you and others are affected. Describing reactions or consequences allows the other person to see and understand the impact their actions are having on others, the team and the organization.

Examples: *"I felt uncomfortable about the disagreement between you and your colleague yesterday." "Losing your patience with a team member is not the behaviour we encourage here." "Let's meet to talk about alternative ways to approach this type of situation."*

4. GIVE THE OTHER PERSON AN OPPORTUNITY TO RESPOND

Feedback is a two-way street. Don't forget to listen to what the other person has to say. Remain silent and provide eye contact while patiently waiting for their answer. If the person hesitates to respond, ask an open ended question.

Examples: *"What do you think?" "What is your view of this situation?" "What is your reaction to this?" "Tell me, what are your thoughts?"*

5. OFFER SPECIFIC SUGGESTIONS

Whenever possible make your suggestions helpful by including practical, feasible examples. Offering suggestions shows that you have thought past your evaluations and moved to how to improve the situation. Constructive feedback is centered around development and coaching.

Even if people are working up to expected standards, they can always benefit from ideas that could help them perform better!

Examples: *"I sometimes write myself notes or color-coded post-its to remind myself to do something; you might find it helpful too." Or "During your next meeting, if you're not interested in all the details, you might try only asking specific questions about the information you are most interested in."*

6. SUMMARIZE AND EXPRESS YOUR SUPPORT

At the end of the conversation, it's always important to review the major points you discussed. Summarize the action items, not the negative points of the other person's behavior. For corrective feedback, stress the main things you've discussed that the person could do differently and develop their skills. It's important to always end on a positive note by expressing confidence in the person's ability to improve the situation.



Examples: *"As I said, the way the group has figured out how to cover phone calls has really lessened the number of phone messages to be returned. You've really followed through on a tough problem. Please keep taking the initiative on problems like that."*

7. GIVING POSITIVE FEEDBACK

Positive feedback is too important to let slide. Say something right away. Be specific and be sincere. It is important to consider the person receiving the recognition. Offer acknowledgement in a way that supports personal preferences. Some employees prefer public acknowledgement while others prefer it in private. Don't wait for the big successes. Celebrate the small ones too. Be sure to celebrate appropriately - big successes need big recognition and small successes need smaller recognition. Finally, try to ensure that recognition is evenly distributed among team members.

Examples: *"Mary, thank you so much for your leadership in the ----- project. You completed the project on time and in budget. This was significant to our department's success. I am also extending recognition to all project team members. Your collective efforts contributed to the project's success. Let's schedule a lunch to celebrate this significant accomplishment."*

THE IMPACT OF DIFFICULT CONVERSATIONS

	Having a Difficult Conversation	Avoiding a Difficult Conversation	
Positive Impact 	<ul style="list-style-type: none"> • Clarity created – <i>leader demonstrates care</i> • Team feels valued – <i>individuals have a voice</i> • Performance Improves – <i>trust builds</i> • Accurate communication increases – <i>positive cross functional work</i> • Personal Growth – <i>confidence builds</i> • Career planning begins – <i>passion and strengths harnessed</i> • Engagement increases – <i>innovation multiplies</i> • Succession planning – <i>retention up</i> • Strategic target met – <i>and surpassed</i> 	<ul style="list-style-type: none"> • Confidence diminishes – <i>competence goes down</i> • Distrust grows – <i>denial, hiding occurs</i> • Productivity & innovation slows – <i>top performers workloads increased</i> • Team dysfunction – <i>poor performance</i> • Stress builds – <i>transparency diminishes</i> • Inconsistent leadership – <i>micro manage/abandon</i> • Strategic targets missed – <i>blame accelerates</i> • Passive aggressive behaviour – <i>active sabotage</i> • Disengagement – <i>absenteeism increases</i> 	 Negative Impact
	<i>Enables...</i> CLARITY CAPABILITY COLLABORATION	<i>Results in...</i> CONFUSION DISEMPOWERMENT ESTRANGEMENT	

The key to minimizing difficult conversations is to have conversations regularly throughout the year

COACHING CONVERSATIONS IN DIFFICULT SITUATIONS

Handling a difficult conversation requires skill and empathy, but ultimately, it requires the courage to go ahead and do it. The more you get into the habit of facing these issues squarely, the more adept you will become at it.

- 1. BE CLEAR ABOUT THE ISSUE.** To prepare for the conversation, you need to ask yourself two important questions: "What exactly is the behavior that is causing the problem?" and "What is the impact that the behavior is having on you, the team or the organization?" You need to reach clarity for yourself so you can articulate the issue in two or three succinct statements. If not, you risk going off on a tangent during the conversation. The lack of focus on the central issue will derail the conversation and sabotage your intentions.
- 2. KNOW YOUR OBJECTIVE.** What do you want to accomplish with the conversation? What is the desired outcome? What are the non-negotiable? Once you have determined this, plan how you will close the conversation. Don't end without clearly expressed action items. What is the person agreeing to do? What supports are you committed to provide? What obstacles might prevent these remedial actions from taking place? What do you both agree to do to overcome potential obstacles? Schedule a follow up to evaluate progress and definitively reach closure on the issue at hand.
- 3. ADOPT A MINDSET OF INQUIRY.** Spend a little time to reflect on your attitude toward the situation and the person involved. What are your preconceived notions about it? Be open to hear first what the other person has to say before reaching closure in your mind. Even if the evidence is so clear that there is no reason to beat around the bush, we still owe it to the person to let them tell their story. A good leader remains open and seeks a greater truth in any situation. The outcome of adopting this approach might surprise you.
- 4. MANAGE THE EMOTIONS.** Most of us were likely raised to believe that emotions need to be left at the door. We now know that this is an old-school approach that is no longer valid in today's work environments. It is your responsibility as a leader to understand and manage the emotions in the discussion. We can avoid this by being mindful of preserving the person's dignity—and treating them with respect—even if we totally disagree with them.
- 5. BE COMFORTABLE WITH SILENCE.** There will be moments in the conversation where a silence occurs. Don't rush to fill it with words. A pause also has a calming effect and can help us connect better. For example, if you are an extrovert, you're likely uncomfortable with silence, as you're used to thinking while you're speaking. This can be perceived as steamrolling or overbearing, especially if the other party is an introvert. Introverts want to think before they speak. Stop talking and allow them their moment—it can lead to a better outcome.
- 6. PRESERVE THE RELATIONSHIP.** A leader who has high emotional intelligence is always mindful to limit any collateral damage to a relationship. It takes years to build bridges with people and only minutes to blow them up. Think about how the conversation can fix the situation, without erecting an irreparable wall between you and the person or your team.

7. BE CONSISTENT. Ensure that your objective is fair and that you are using a consistent approach. For example, if the person thinks you have one set of rules for this person and a different set for another, you'll be perceived as showing favoritism. Nothing erodes a relationship faster than perceived inequality. Employees have long-term memories of how you handled situations in the past. Aim for consistency in your leadership approach. We trust a leader who is consistent because we don't have to second-guess where they stand on important issues such as culture, corporate values and acceptable behaviors.

8. DEVELOP YOUR CONFLICT RESOLUTION SKILLS. Conflict is a natural part of human interaction. Managing conflict effectively is one of the vital skills of leadership. Have a few, proven phrases that can come in handy in crucial spots.

9. WATCH YOUR REACTION. One of these mistakes is how we respond to other people, their intentions, actions, behaviours verbal statements. The best advice is to simply address the issue (not the person) openly and sincerely. If someone is unresponsiveness, you can candidly say, "I don't know how to interpret your silence." Disarm what you perceive by labeling the observed behavior.

10. CHOOSE THE RIGHT PLACE TO HAVE THE CONVERSATION. Calling people into your office may not be the best strategy. Sitting in your own turf, behind your desk, shifts the balance of power too much on your side. Even simple body language, such as leaning forward toward the person rather than leaning back on your chair, can carry a subtle message of your positive intentions; i.e., "We're in this together. Let's problem solve so that we have a better workplace." Consider holding the meeting in a neutral place such as a meeting room where you can sit adjacent to each other without the desk as a barrier. Don't exclude the coffee shop.

11. KNOW HOW TO BEGIN. Some people put off having the conversation because they don't know how to start. The best way to start is with a direct approach. "John, I would like to talk with you about what happened at the meeting this morning when Bob asked about the missed deadline. Let's grab a cup of coffee tomorrow morning to chat." Or: "Linda, I want to go over some of the issues with XYZ customer and some concerns that I have. Let's meet tomorrow morning to problem-solve."

Being upfront is the authentic and respectful approach. You don't want to ambush people by surprising them about the nature of the "chat." Make sure your tone of voice signals discussion and not inquisition, exploration and not punishment.

Adapted from: Bruna Martinuzzi

ESTABLISHING EMPLOYEE INDIVIDUAL DEVELOPMENT PLANS

The manager and employee have an open and honest discussion regarding strengths, areas for development, interests, goals and department requirements. It is important that this discussion focuses first on identifying development needs required to strengthen the employee's skills and capabilities within their current role. Strengthening capability in the employee's current role becomes the foundation for success in future roles.

Conducting Development Discussions:

Examples of questions that could be used during the development discussions with employees.

<p style="text-align: center;">EMPLOYEE CAREER PERSPECTIVE</p> <ul style="list-style-type: none"> • Explore individual's overall career expectations, both short and long-term • Explore multiple development options including enrichment in current job; going forward 1 - 3 years and longer term • Test your own assumptions about the individual's interests • What does the individual enjoy most and least about their current role? 	<ul style="list-style-type: none"> • <i>What are some important career and professional development issues for you now?</i> • <i>What are your short & long-term career expectations?</i> • <i>What is important to you in terms of work?</i> • <i>How are you defining "success"?</i>
<p style="text-align: center;">DEPARTMENT / ORGANIZATION CONTEXT</p> <ul style="list-style-type: none"> • Provide an information update about the department • Review possible changes and opportunities 	<ul style="list-style-type: none"> • <i>Do you have any other questions about the department / organization?</i> • <i>Is there anything that may impact on your professional development?</i>
<p style="text-align: center;">STRENGTHS TO LEVERAGE</p> <ul style="list-style-type: none"> • Emphasize that leveraging strengths is just as important in development planning as identifying growth areas • Provide your feedback and discuss strengths that can be further utilized • Ask for employee's perspective • Discuss projects, committees, job roles that would capitalize on these strengths 	<ul style="list-style-type: none"> • <i>In what ways do you think you have contributed to the goals, strategy, and objectives of the department / Organization?</i> • <i>What are some examples of success?</i> • <i>How would you describe your strengths?</i> • <i>Which strengths would you like to further leverage in the organization?</i>

<p style="text-align: center;">DEVELOPMENT NEEDS</p> <ul style="list-style-type: none"> • Discuss development needs • Identify the skills, knowledge, or attributes that need development? • Ask for employee's perspective, feedback and clarification • Provide your feedback 	<ul style="list-style-type: none"> • <i>Where do you see growth opportunities?</i> • <i>What do you consider some of your development needs?</i> <ul style="list-style-type: none"> – <i>New knowledge needed?</i> – <i>Exposure to different functions or customers?</i> – <i>Skills to learn?</i> – <i>Personal style to modify?</i>
<p style="text-align: center;">DEVELOPMENT ASSIGNMENTS</p> <ul style="list-style-type: none"> • Brainstorm potential development assignments, projects, or job functions that would provide development opportunities 	<ul style="list-style-type: none"> • <i>What work experiences will help you develop?</i>
<p style="text-align: center;">COURSES and SEMINARS</p> <ul style="list-style-type: none"> • Discuss learning needs that can be served through taking courses, seminars, or attending conferences 	<ul style="list-style-type: none"> • <i>Which learning needs can be addressed by reading, taking courses, seminars, or attending conferences?</i>
<p style="text-align: center;">DEVELOPMENT RELATIONSHIPS</p> <ul style="list-style-type: none"> • Identify opportunities to work with individuals who are strong in a particular skill? 	<ul style="list-style-type: none"> • <i>From whom might you learn new skills and acquire knowledge?</i> • <i>With whom would you like to work?</i>
<p style="text-align: center;">FUTURE ROLE / CAREER PLAN</p> <ul style="list-style-type: none"> • Discuss next potential steps in the department 	<ul style="list-style-type: none"> • <i>What are your thoughts on this?</i>
<p style="text-align: center;">DEVELOPMENT PLAN IMPLEMENTATION</p> <ul style="list-style-type: none"> • Review suggestions to leverage existing strengths and work on developing needs • Clarify any interim information that is needed • Set time to review follow-up plan • Staff member has responsibility to finalize development plan based on initial discussion 	<ul style="list-style-type: none"> • <i>Considering both strengths and development needs, what are your primary development goals and activities?</i> • <i>What resources will you need?</i> • <i>What barriers to development might occur?</i> • <i>When would be a good time to review your plan?</i>