ETW Monthly 1-to-1 Meeting

Detailed User Guide

GETTING READY:

Investing a small amount of time prior to the meeting will help you to have more effective meetings:

- You should require that all direct reports provide their monthly update in ETW providing planned results, actual results and improvement efforts at least one day prior to your 1-to-1 meeting with them so you have the most current information.
- You should reply to those updates in your stream by either giving supportive and developmental feedback or letting the employee know you will discuss their update in more detail during the 1-to-1.
- You should ask all direct reports to be prepared to discuss their major objectives, performance requirements and related KPIs, as well as ask any questions or share concerns.
- Right before the meeting, you should be sure to review all conversations in your Stream from your direct report to ensure you have the most current information.

STARTING THE MEETING:

Start the meeting by ensuring you and your direct report have access to the ETW application and are viewing the same items. If you are meeting in person, share your monitor so you are both viewing your ETW account. If you are conducting a virtual meeting, share your screen online. If you are conducting a meeting by phone, ask your direct report to view his or her account while you view your account and talk through the information.

CONDUCTING THE MEETING...

Section One:

Reviewing Execution Plan(s)

This section outlines the process for meeting to review the execution plan(s) with your direct report and includes the steps you should follow, how to use ETW in completing these steps, and guidelines for an effective discussion.

Section One – Reviewing the Execution Plan(s)

The execution plan is a powerful tool you can use to communicate the relationship of your direct report's goals (major objectives and performance requirements) to the organization's strategy. If your account provides you access to the execution plan, it is recommended that you utilize the plan to review the strategy, communicate the current state of the strategy, and discuss how it relates to your direct report's goals prior to discussing the specific goals. This provides a framework and association that connects your direct report to the strategy.

1. Begin by opening the Execution Plan. (repeat for each applicable Execution Plan)

a. Go to the Execution tab and select the specific execution plan you will be reviewing by clicking on the title in Execution Plan Card you wish to access.

2. Review the Strategy Elements and KPIs for the execution plan

a. Navigate down the page.

i. Explain why the organization is focusing on these strategy elements and their importance to the overall success of the organization

ii. For each KPI, review the current status and discuss significant changes or developments

3. Review the Operative Groups (repeat for each applicable Operative Group)

a. Select the Operative Group by clicking on the title in the Operative Group you wish to access.

b. The Operative Group with all of the major objectives and top- level KPIs for the Operative Group will be displayed.

i. Discuss the current performance of the operative groups that your direct report is primarily supporting by opening each group and reviewing KPIs at the operative group level.

ii. Discuss any major objectives in the operative group that your direct report is not an owner of but you feel are significant to share. Emphasize how these other objectives could impact results and what is being done to drive better results.

iii. Reviewing the KPIs and Major Objectives in the Operative Groups will likely trigger some questions from either you or your direct report and should be embraced as part of the 1-to-1 meeting process.

Next: Reviewing the Goals of Your Direct Report

Section Two:

Reviewing The Goals Of Your Direct Report

This section outlines the process for reviewing the specific goals of your direct report and includes the steps you should follow, how to use ETW in completing these steps, and guidelines for an effective discussion.

Section Two – Reviewing the Goals of Your Direct Report

1. Start by accessing your direct report's requirements.

a. Go to your My Team Page, select employee's picture to open up the employee's My Requirements page

i. Review the goals of your direct report in order to ensure they are still relevant and thoroughly discuss them during the meeting

2. Review the requirement along with the related notes (repeat for each listed requirement)

a. Select the notes link on the card to expand the requirement and show more detail.

i. Check the structure:

1) Is the due date still accurate?

2) Is the required interval for updates sufficient?

ii. Confirm the relevance:

1) Is the requirement clearly defined and does it still apply?

2) Does the scoring criteria still apply?

3) Is the requirement linked to strategy correctly?

iii. Review the latest update and other notes.

3. Make any needed adjustments to the requirement

a. To edit a Performance Requirement, select the edit link on the Performance Requirement card.

b. To edit a Major Objective, select the blue title of the objective on the card. This will open a new tab in your browser displaying the major objective in the execution plan. Select the settings button to edit that objective.

4. Discuss the progress and status of the Performance Requirement.

a. If you have already replied to the update in the Stream of ETW, then ask your direct report if there is anything else he or she has questions about regarding the particular requirement before moving on to the next one.

b. Ask clarifying questions about the update to make sure you have a crystal clear picture of what the employee is doing going forward to get better results and why they are doing it. You want to be certain that you understand the thinking behind the improvement efforts so you can provide coaching and give good feedback.

c. Sample questions for clarification:

i. What are you doing to ensure that it will be completed on time?

ii. What is the approach you are using to accomplish the initiative?

iii. Why did you choose that approach?

iv. What is getting in the way and what can you do to overcome the issue/setback?

v. How will you know if the results have been achieved?

vi. Who do you have leading this initiative and what could they be doing to improve?

d. For goals that are green:

i. To what factors do you attribute this success?

ii. How do you think we can replicate these results elsewhere in the organization?

e. For goals that are yellow:

i. How can we get this back on track?

ii. What have you learned?

iii. How can I help you turn this around?

iv. For goals that are red:

v. How can we get this back on track?

vi. What are the challenges?

vii. How can I help you turn this around?

5. If no update was provided by your direct report, work with him or her to complete the update together.

a. To change the status, select the 'Add a Note' button on the bottom of the card that is open. Select the round circle icon to the left of the text field and select the most appropriate status based on the scoring criteria. When completed select the 'Submit Note' button.

i. Ask the employee if they have any questions about what is expected in the updates or if the requirement is unclear.

ii. Discuss what the employee's plan number, actual number, improvement efforts and status should be for the requirement and summarize it in ETW.

iii. Let the employee know that the requirements should be updated before the next 1-to-1 meeting. Show the employee how to do this or share resources for application training such as:

1) Your organization's internal administrator

2) The Help or Education link in the application

3) Your customer support contact

6. Provide supportive and developmental feedback.

a. Offer guidance and identify new solutions or approaches.

b. Stretch your direct report to grow and exceed expectations by sharing your experience, perspective and strategic thinking so he or she can learn and apply this over time.

c. Remember to congratulate or thank your direct report for results or progress.

7. Verify the status of the requirement and if necessary update the status.

a. Select the 'Add a Note' button on the bottom of the card that is open. To set status select the round circle icon to the left of the text field and select the most appropriate status based on the scoring criteria then select the 'Submit Note' button.

i. Make sure the status is set according to the scoring criteria.

8. Capture key points of your discussion in ETW.

a. Select the 'Add a Note' button on the bottom of the card that is open. In the text field that appears, type your notes, then select the Submit Note button.

i. Record key discussion items for reference by you and/or your direct report. Include information that others need to know.

ii. Capture any action items or ideas discussed as well as due dates for commitments in ETW by entering a note in the respective requirement

Continue until you have reviewed all requirements, answered all questions, and are confident your direct report knows exactly what to focus on going forward to get results.

Next: Additional Review Items

Section Three:

Additional Review Items When Your Direct Report Is Also A Manager

The purpose of this section is to outline additional items that should be reviewed during a 1-to-1 meeting with a direct report who manages others. ETW provides transparency and allows you to see the dialog, supportive and developmental feedback, engagement and collaboration that your direct report has provided to his or her direct reports.

Section 3 – Additional Review Items when your direct report is also a manager.

Reviewing a manager's management of the team is an important component of the 1-to-1 meeting. The topics covered will include the steps you should follow, how to use ETW in completing these steps, and guidelines for an effective discussion.

1. View how your direct report is managing his or her team by drilling down into the leadership hierarchy

a. From your My Team page, select the menu icon to the right of your direct report and select View Team link from the drop down menu. This will give you a view of your direct report's team.

i. Ask the manager how each team-member is performing and discuss specific actions being taken to improve results.

ii. Ask the manager if they think they have all of the right people in the right positions and discuss actions being taken to either improve the individual's results or make a change?

2. View the details of the requirements of any individual on your direct report's and make sure the employee has appropriate requirements

a. Select the image of the team-member. You will be taken to that person's My Requirements page where you can view their requirements. Select the notes link on the card to expand the requirement and show more detail.

i. Spot-check to confirm if the employee is engaged with the assigned requirements and giving regular updates and that the manager is providing supportive and developmental feedback to the employee.

ii. If your direct report (who is a manager) is actively driving an objective with his or her team, you would expect to see the following:

1) A high level of communication back and forth in the dialogue of the requirements.

2) Employee updates that state progress and improvement efforts and manager comments that clarify and coach to help drive the result. If this is lacking:

a) Emphasize what the expectations are and the importance of

regularly discussing improvement efforts related to the most important goals.

b) Ask your direct report how they are driving important goals through the team and make a note of it in ETW. Tell him or her you expect to see evidence of this in future 1-to-1 meetings.

3. View the Stream page of the manager you are meeting with to better understand how he or she is communicating with, manages and develops the team.

a. To view the Stream page of your direct report, go to your Stream page and in the text field titled "View Stream of" type in the name of the manager you are meeting with.

i. As you view your direct report's Stream page scroll down the page and note:

1) If they are have replied to their direct report's updates

2) Look for the quality and frequency of their direct report's updates and the manager's response to the updates

3) Does the direct report state plan, actual and improvement efforts? Is your manager direct report guiding them to do this?

4) Does the direct report share his or her thinking and provide detail to better enable being coached? Is the manager asking for clarification and driving the conversation toward results?

ii. Make sure the manager is having developmental conversations with direct reports and not just giving praise

iii. Think in terms of what additional information or perspective you would be able to add to the conversation if you were the manager, and share that information during the 1-to-1 with the manager so that you can start developing the manager's coaching skills.

1) Capture any feedback or coaching in the ETW system by going to the employee's My Requirements page and adding a note in the most relevant requirement the employee has. This is important so you can reference and discuss the feedback in future meetings.

4. View the Archive Stream of the manager so you can see all of the items they have already replied to and/or dismissed.

a. To view the Archive Stream page of your direct report from their Stream page, select the archive icon located above the stream notes.

Continue to look for the quality and frequency of engagement and follow the same steps discussed above.