

Truvelop Journey Milestones

Anniversary/Initial Talent

Assessment

- Discuss performance goals and learning opportunities with Team Member at the start of the year/project. Reflect on the following:
 - Employee's accomplishments
 - Employee's areas of opportunity
 - Short and long-term goals
 - Support from manager and company to meet goals
- Evaluate the Team Member in Truvelop
- Document notes in GENERAL COMMENTS section and share

Developmental Coaching

- Provide direction, support, and advice with career exploration
- Open and honest feedback is appreciated
- Document as a Spark or Evaluation and share with Team Member

Quick Connect Conversations

- Impromptu daily or weekly 2-10 minute conversations
- In-the-moment feedback is very powerful
- Show appreciation and praise
- Document as a Spark and share with Team Member

Regular Check-Ins

- Review successes/barriers and align/reset priorities with Team Member
- Document as an evaluation and share with Team Member

Progress Review Meetings

- Meet at the end of the year/project to celebrate successes, prepare for future achievements, and plan for development/growth opportunities
- Focus on purpose, goals, development, engagement, and wellbeing
- Document as an evaluation and share with Team Member

Utilize the Knowledge Center

- Helpful tips and tricks on how to use the Truvelop platform
- Information about how to have crucial conversations with team members
- <https://knowledge.truvelop.com/truvelop-knowledge-center>

THE INITIAL DEVELOPMENT DISCUSSION: WHAT TO EXPECT

Objectives

- Using the Truvelop Evaluation Summary, set performance goals and learning opportunities with Team Member. Reflect on the following:
 - Employee's accomplishments
 - Employee's areas of opportunity
 - Short and long-term goals
 - Support from manager and company to meet goals
 - Encourage the Team Member to share their perspective
 - Document notes in worksheet and attach to a Spark
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Outcome Goal

After this touchpoint, Manager and Team Member should have a strong understanding of the performance goals and expectations. The direction has been set and documented.

Reflect Before the Touchpoint

- What do I know about this Team Member? (Reflect on the Evaluation Summary, strengths, and areas for growth)
- What are my expectations for the Team Member going into the next performance period?
- How can I incorporate this Team Member's passions into their development goals?
- How can I best support this Team Member in the upcoming project/year?



THE INITIAL DEVELOPMENT DISCUSSION: WHAT TO EXPECT

Introducing Truvelop

This process is new for all of us! There are going to be questions. You can set the stage for this discussion by:

- Emphasizing that there will be a learning curve
- Sharing the Evaluation Summary, explaining what it means, and sharing a bit about how you went into the Evaluation (what did you observe or consider when answering the questions)
- Leave room for questions
 - Does the Team Member agree with their Summary? If they don't, let's talk about where the discrepancy lies.
 - What do they want to get out of their Truvelop experience?

Questions to Ask the Team Member

- What strengths are you bringing to this project/year?
- What are you hoping to get out of this project/year?
- What are your top performance goals for this project/year?
- How can I best support you going into this project/year?

Any Additional Notes?

Don't forget to put these notes in a Spark! You can either attach this document as a PDF or you can type out your notes and send a private Spark so that you can go back and reference these notes.

TRUVELOP JOURNEY

MILESTONES: QUICK CONNECT CONVERSATIONS

Objectives

- Impromptu daily or weekly 2-10 minute conversations
- In-the-moment feedback is very powerful
- Show appreciation and praise
- Document as a Spark and share with Team Member

Outcome Goal

With each Quick Connect Conversation, Team Members are receiving in-the-moment feedback that is letting them know if they are doing a good job, if there are any adjustments that they need to make, and are continuing to build a relationship with their Manager. These regular quick touchpoints cause subtle performance changes that can lead to significant development over time.

Reflect Before the Touchpoint

- What positive changes have I noticed from this Team Member?
- What is this Team Member doing well?
- Are there any adjustments that the Team Member should be making?
- Am I following the 4 Praises for each Coaching moment pattern?





TRUVELOP JOURNEY MILESTONES: QUICK CONNECT CONVERSATIONS

Questions to Ask the Team Member

- What positive changes have you recently made?
- Do you have any clarification questions about your work? Do you need help with anything?
- How engaged are you currently feeling by this project?



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TRUVELOP JOURNEY

MILESTONES: **REGULAR**

CHECK-INS

Objectives

- Review successes/barriers and align/reset priorities with Team Member
 - Document as an evaluation and share with Team Member
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Outcome Goal

With each evaluation, we are able to see measurable change in performance. From this data, we're able to identify any changes that should be made to previously established goals, or it may be time to set a new goal if the Team Member accomplished what they set out to achieve. After this conversation, both the Team Member and Manager should have an understanding of where the Team Member is currently at and how they are going to proceed forward in their development journey. Strengths and growth areas have been reviewed.

Reflect Before the Touchpoint

- What progress has this Team Member made towards their goals?
 - What obstacles is this Team Member currently facing? How can they overcome them?
 - Are there any adjustments that the Team Member should be making?
 - Are we currently leveraging this Team Member's strengths?
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TRUVELOP JOURNEY MILESTONES: **REGULAR** **CHECK-INS**

Questions to Ask the Team Member

- Do you feel like you have been making progress towards your goals?
 - What has been going well?
 - What is still standing in your way?
- What else can I be doing to support you in your pursuit of your goals?

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TRUVELOP JOURNEY

MILESTONES: DEVELOPMENTAL COACHING

Objectives

- Provide direction, support, and advice with career exploration
- Open and honest feedback is appreciated
- Document as a Spark or Evaluation and share with Team Member

Outcome Goal

After this touchpoint, the Team Member should leave feeling supported and with a better understanding of how they can reach their career goals. Transparency is crucial here. Team Members want to know where they're at and what they need to do to achieve their goals. The Manager should be able to name the Team Member's strengths and focus areas. This is also a good opportunity for Managers to receive feedback on how they can best support their team.

Reflect Before the Touchpoint

- What are this Team Member's strengths?
- What are this Team Member's growth areas?
- Is this Team Member in the right role? Can we be leveraging this Team Member's strengths elsewhere?
- Are there any learning opportunities available for this Team Member to work on their growth areas?

TRUVELOP JOURNEY

MILESTONES: DEVELOPMENTAL COACHING

Questions to Ask the Team Member

- What do you see as your top strengths?
 - What areas of your performance do you want to work on?
 - Do you feel like you are working towards your career goals? How can we help you to continue to work towards those goals?
 - What else can I be doing to support you in your developmental journey?
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TRUVELOP JOURNEY

MILESTONES: PROGRESS

REVIEW MEETING

Objectives

- Meet at the end of the year/project to celebrate successes, prepare for future achievements, and plan for development/growth opportunities
- Focus on purpose, goals, development, engagement, and wellbeing
- Document as an evaluation and share with Team Member

Outcome Goal

The main results that should come from this touchpoint is that wins have been celebrated and new goals have been created. This touchpoint will typically take place after a longer project or performance period, so you can think bigger picture here. Use your previous documentations to support and guide your feedback.

Reflect Before the Touchpoint

- What progress has this Team Member made towards their goals?
- Using previous documentation, think of specific examples of performance development.
- Are there any performance gaps that this Team Member should focus on?
- What potential do you see in this Team Member?



TRUVELOP JOURNEY MILESTONES: PROGRESS REVIEW MEETING

Questions to Ask the Team Member

- What progress have you made towards your goals?
- What area of your performance has grown the most during this period? Why do you think it has grown the most?
- What are the current gaps in your performance?
- What do you want to work on going forward? Do you have any new goals?
- Is there anything you would change about how I support you in your performance development?

Any Additional Notes?

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