The Supervisor's Notebook

Supervisors should plan for and document their ENGAGE discussions with team members in a notebook specifically for each team member.

To help with tracking progress and action items, documentation should be kept about work expectations, job performance, feedback given or received, innovative ideas, and development opportunities.

BEFORE THE MEETING: PLAN YOUR CONVERSATION

The advantage of having frequent meetings and conversations with team members is that you do not need to cover everything in each meeting. Instead focus on specific goals, projects or coaching moments.

To plan for your conversation with each team member, use your notebook to write down the major points you want to cover during the conversation.

Typical points include

- Confirmation of goals, tasks and projects assigned to the team member.
- Status of specific goals or objectives the team member is working on.
- Team member accomplishments.
- Specific feedback for the team member based upon observed behaviors – and steps to implement the feedback.

Here is an example of what a supervisor's meeting agenda might look like in their notebook. This example is for the first ENGAGE meeting of the year.

This example is for the first ENGAGE meeting of the year. In this example, the supervisor plans to talk with team member, David, about work expectations for the year, to provide clarification, and to answer questions, address concerns, and make changes as needed. The supervisor also has a notation to discuss a new project for David and an idea that can help David with his ongoing professional development. The supervisor also has a reminder to provide specific feedback on a recently completed project and to discuss corrective action steps.

Meeting with David Goliath on February 15 @ 2PM

Clarify Core Objectives

Go over David's list of standard work assignments from last year

- Primarily the same with the following exceptions:
- Number of new outreach programs developed each year should increase from 2 to 3

  Is this reasonable?

- Submit quarterly training schedule two months prior to the beginning of the next quarter instead of six weeks. Six weeks doesn't give us enough time to review and finalize.

- Do any other objectives need to be changed or updated/why?

New Projects

Ask David to work with Ann to come up with five ways to increase agency interest in our new Employee Recognition website. Submit ideas for my review by March 30. Implement at least two ideas by May 1.

Development Areas

It would help David to develop his customer relations skills. Discuss working more with contractors and customers to finalize specific requests for services (deliverables, contracts, follow-up). We can pair-up on the next request. Then David can solo with minimal oversight.

Feedback

The rollout of the new Leading Today webinar went well. The content was useful and relevant. David's research and attention to detail paid off! There were connection problems though. Three people couldn't log-on and complained. Two people said they weren't sure how to use the chat pods. Some of this could have been avoided. Discuss steps to correct this.

What feedback do you have for me – how can I help?

Questions?

DURING THE CONVERSATION: TAKE NOTES

Use the notebook to capture important points along the way as the conversation progresses.

Examples of notes may include:

- Confirmation of specific expectations discussed in the meeting.
- Agreed-upon goals resulting from the conversation.
- Examples of positive or poor job performance.
- The team member's response to specific feedback you provided about their job performance.
- Feedback received from the team member about the supervisor's leadership, communication style, specific ways to help the team member, and other concerns or observations.
- Questions or requests from the team member you need to follow-up on prior to the next meeting.

AS THE MEETING CONCLUDES: REVIEW YOUR NOTES

Make sure that both you and the team member have written down pertinent information. Refer back to your notebook to summarize key points with the team member.

This will help to:

- Remind you and the team member of any action items.
- Provide another opportunity to clarify or answer questions.
- Reinforce mutual coaching or feedback received.

Each supervisor will need to take or make notes in a manner that works best for him or her, the team member and the circumstance. Here is one example of what a supervisor's notebook with notes from a meeting might look like.

A reminder of what transpired during the meeting and specific follow- up the supervisor should provide after the meeting.

> "David had concerns about increasing the number of new outreach programs. Webinars are okay, but if it's a full day class, he's worried he has too much on his plate. We agreed to keep the number at 3, and to discuss progress on this more often to stay on track or revise if necessary."
>
> "David mentioned that it's easier to remember items for his weekly status report if it's completed on Friday instead of waiting until Monday. We agreed to make the change."
>
> "David said that he stopped by several times to review content on his new webinar but I wasn't available. I told David that devoting time for this is important, and shouldn't be left up to chance. We both agreed to start scheduling meetings for this on Outlook."
>
> "David plans to ask internal staff to help him test the log-on, chat pods, and general run-through for his webinar to avoid trouble spots. We agreed this would occur within 2 weeks, and then again with each new webinar."
>
> "David asked about attending the regional conference this year. I asked him to check on dates and cost so we can discuss it at our next meeting."
>
> **<u>My To-Do's</u>**
>
> "Make changes to David's core work assignment and copy David."
>
> "Schedule a meeting with David and Ann next week to kick-start their work on the Employee Recognition website."

REMEMBER: What you write down about each team member in your notebook should be clear, free from bias, and an accurate reflection of the conversation.

AFTER THE MEETING: PLAN FOR THE FUTURE

Review your notes one more time to make sure you have all the information you need. Referring back to your notebook will help you to:

- Prepare your next ENGAGE meeting with the team member.
- Track trends in the team member’s performance throughout the year.
- Recall critical information shared with the team member about work expectations.
- Chart specific action steps that can help the team member professionally.
- Remember feedback received from the team member that may help you be a better supervisor.
- Focus on the success of each team member, the work team, and the organization.

Find more examples of typical notebook entries on the ENGAGE website in the Additional Resources section.