The Team Member's Notebook

Team members should actively prepare for – *and participate in* – dialogue with their supervisor about their work and professional development. Using your notebook can help make these conversations more productive.

The notebook is a useful "memory tool" to:

- Clarify or reconfirm expectations.
- Track progress.
- Identify and plan for development opportunities vital to professional growth.
- Remember feedback received from – or to share with – your supervisor.
- Take specific actions that can help you do your job better.

BEFORE THE MEETING: PLAN YOUR CONVERSATION

The advantage of having regular ENGAGE conversations with your supervisor is that you will get constructive feedback on a regular basis. That helps you, your supervisor, and your team get better faster.

Your conversations should focus on specific goals, feedback, and professional development goals.

To plan for each conversation, use your notebook to remember things you need help with, or have questions about – and information to provide updates on specific actions you have taken to achieve your goals.

This can include:

- Progress on specific goals or objectives you are currently working on.
- Questions about work you are responsible for.
- Recent Accomplishments your supervisor may or may not know about.
- Professional developmental opportunities you'd like to explore.
- Feedback for your supervisor that can help you both work together better.

Here is an example of what a team member's notebook might look like. We start with a page to plan for the first ENGAGE conversation of the year. The same basic approach can be used to prepare for any ENGAGE conversation. In this example, the team member plans to talk with the supervisor about work goals assigned for the upcoming year. The team member wants to voice a concern about one expectations and possibly modify another. The team member also has a note about specific feedback for the supervisor and a development opportunity.

ENGAGE Meeting with Matt on February 15 @ 2PM

Reviewed the list of work assignments from last year.

Looks good with these exceptions:

- Not sure it will work to come up with 3 new outreach programs. Might be better to keep it at 2 (like last year). Need flexibility!
- Ask about changing due date for weekly status report to Friday instead of Monday. I think I'm forgetting stuff over the weekend! Already mentioned this to Jan and Bill. They'd be okay with it.

Issue! – Can't always get in to see you (busy). Need more time to go over things like new program content in person – NOT EMAIL!

Still want to be more involved in team processes and work with more people – anything new I can do or learn?

Should ask about attending the regional conference this year; want the opportunity to learn the latest from other colleagues

DURING THE CONVERSATION: TAKE NOTES

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

Examples of notes may include:

- Answers to questions that help to clarify job expectations.
- Agreed-upon goals resulting from the conversation.
- Examples of effort to improve performance.
- Specific feedback to get better.
- Development opportunities.
- Feedback you provided to the supervisor on their communication style, and other concerns or observations.
- Questions or direction from the supervisor to follow-up on prior to the next meeting.

AS THE MEETING CONCLUDES: REVIEW YOUR NOTES

Make sure that you have written down the relevant information. Refer back to your notebook to summarize key points with the supervisor.

This will help to:

- Provide another opportunity to make sure that you understood each other.
- Reinforce coaching or feedback received.
- Clarify next steps.

Each team member should make notes in the way that works best for them. But they should capture the main takeaways from the conversation. Some people like detailed notes, others like long sentences, and some like quick bullets. Use what works best for you.

Here is an example of what a team member's notebook with notes from their conversation with the supervisor might look like.

A reminder of what happened during the meeting and specific follow up actions the team member should work on after the meeting.

Discussed core goals

- Keep the number of new outreach programs to 3 – but with some flexibility if other projects get in the way.
- Okay to start submitting the weekly status report on Friday.
- Confirmed – submit training schedule 2 months prior to start of each quarter.

Praise for last webinar, but will schedule more walk-throughs next time to avoid technical glitches (log-on, chat pods…)

NEW! Work with Ann on the Employee Recognition website. Need to submit 5 new ways to increase agency interest by 3/30. Need to have 2 ideas up and running by 5/30.

NEW! Asked to do more with customers and contractors! Pair-up on next customer request, then solo (but okay to ask questions).

Use Outlook to schedule face-to-face meetings when needed.

Regional conference is a possibility…

My To-Do's

Prepare next quarter training schedule ASAP!

Meet with Ann and Mac on ideas for the Employee Recognition website. Reserve Thursday for brainstorming!

Get copies of past customer and contractor agreements to help with handling customer requests.

Get date and cost for the next regional conference.

Review your notes one more time to make sure you have all the information you need. Remember your notebook should be useful to you, be clear and accurate.

AFTER THE MEETING: PLAN FOR THE FUTURE

You should check your notes every week or two just to help you stay focused on what you can do to move forward with your goals.

Looking back at your notes will help you to:

- Remember feedback received from the supervisor that may help you do your job even better.
- Capture ideas you shared to improve teamwork.
- Track trends in your own performance throughout the year.
- Chart progress to your goals.
- Prepare for your next ENGAGE conversation.

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