



## **STEPS FOR CONDUCTING A DEVELOPMENTAL PLANNING SESSION**

### **Establish rapport**

**1**

First, try to put the person at ease. Always attempt to establish a constructive interpersonal atmosphere before discussing developmental issues.

**2**

### **Explain the purpose of the session**

Next, indicate that the purpose of the meeting is to discuss developmental needs and formulate plans of action for addressing these needs. Position the session as a benefit to the direct report (i.e., discuss issues and answer questions).

**3**

### **Mutually discuss developmental information**

Using the Pre-Planning Form, begin having already identified the skill area or areas you want to address. It is helpful if the person has already completed a Pre-Planning Form with his/her perceptions. Share perceptions and listen carefully to the person's thoughts and ideas.

Begin the discussion in a constructive manner. To help achieve this, start by addressing the positive aspects of the direct report's performance. These strengths may have been identified through observations or documentation of on-the-job performance. Be as specific as possible.

Next, discuss aspects of performance identified as needing development; solicit the person's views and opinions. Ask the direct report to share his/her perceptions before voicing your own. Having heard the person's comments, offer your perceptions and discuss how these thoughts are similar to or different from those of the individual.

If, however, the person appears uncomfortable or reluctant to share his/her ideas first, help put the person at ease by offering to begin the discussion.

#### **Reach agreement on developmental needs**

**4**

After thoroughly discussing developmental needs, reach agreement with the person as to which skill area(s) to target for further development. Ask the person to suggest potential developmental actions before offering your suggestions. Discuss action plans to address the targeted developmental needs.

#### **Reach agreement on developmental action plans**

**5**

After discussing potential action plans, reach a mutual agreement on specific action plans for each targeted developmental need. Then, document the plan on the Employee Development Planning (EDP) form. Record agreed-upon developmental needs in the "Aspects of Skill to Be Developed" column, the objective for developing the skill in the "Objective" column, the action plans in the "Developmental Activities" column, and include time frames for achieving the desired results on the EDP form. Both you and the individual should receive a copy of the completed EDP form.

#### **Schedule follow-up**

**6**

In order to encourage a partnership in achieving successful results, you should monitor the person's performance in carrying out the agreed-upon developmental action plans. In this step of the process, communicate that follow-up will occur within a specified period of time. Record this information in the "Follow-Up" column.

#### **Close the session**

**7**

Close the session on a positive note. Discuss the developmental value of the experience and stress the fact that the skills measured can be improved through developmental activities. Express confidence in the direct report's ability to successfully address the areas targeted for development.