

A guide to...

Quality PDR conversations



How to use the Guide

This how-to guide is a step-by-step, practical guide to support you as you prepare for and undertake discussions which are part of a Performance Development Review (PDR).

The guide is designed to help you as someone who is going to be:

- Participating in PDR conversations with your manager
- Leading PDR conversations with people in your team

The guide provides you with best practice, hints and tips and checklists to make sure you have covered the key areas in your preparation and in the conversations that follow.

Contents

- Introduction
- Preparing for Annual and Interim PDR Discussions
- Conducting the PDR Conversation
- PDR Development Planning
- Regular 1-2-1 Meetings
- Appendix 1 – Additional conversation structures to help you conduct an effective PDR Discussion
 - Dealing with Difficult Conversations
 - Accountable Conversations
- Appendix 2 – Resources to help you plan Development
- Appendix 3 – SWOT Template.

Introduction

At the centre of a PDR process is a series of PDR conversations, whether they be 1-2-1s, interim or annual review conversations.

Use this guide to make the most of these conversations, to ensure that they:

- Enable the development of skills and capabilities
- Help to identify and realise potential at work
- Ensure the celebration of achievements
- Help to improve performance.

These elements build the culture and conditions in an organisation and enable us all to deliver the highest standards.

Please note: The information contained in this Guide should be read in conjunction with the series of How to Guides which cover the following areas:

- Individual and Team Objectives Setting
- Giving & Receiving Constructive Feedback

The PDR Conversation

At the epicentre of the PDR process is a series of conversations; conversations between our line manager, our colleagues and ourselves. These discussions, which are both formal and informal, provide us with the time and space to reflect on how we are doing, to celebrate achievements, to seek and give feedback, to identify when we are struggling to perform, to explore and overcome barriers to our progress, to seek support and to plan development.

The PDR process generally involves four different types of discussion:

- Ongoing informal 1-2-1 discussions
- Interim PDR discussions
- Annual review discussions
- Team objective setting and review discussions.

For these conversations to be meaningful and to achieve their purpose, a number of key elements have to be present, those involved need to:

- Trust each other and enjoy a level of rapport such that they are able to be open and honest
- Have a shared understanding of what they are trying to achieve (objectives / roles & responsibilities / accountabilities)*
- Prepare by reflecting on what has / has not been achieved, how it has been achieved (Values and Behaviours) along with issues and concerns
- Be prepared and ready to give open and honest feedback to each other*
- Be prepared to share challenging feedback and know what to do if feedback is rejected
- Focus on support and development
- Agree and follow up on actions to progress activities, objectives, learning & development, etc.
- Keep relevant notes of the meetings to refer back to in preparation for the next conversation.

What follows will help you ensure these ingredients are in place. Some elements above (marked with an *) are covered in other How to Guides.

Three dimensions of great performance

Great performance occurs when there is a balance between three key dimensions – outcomes, values and behaviours and development.

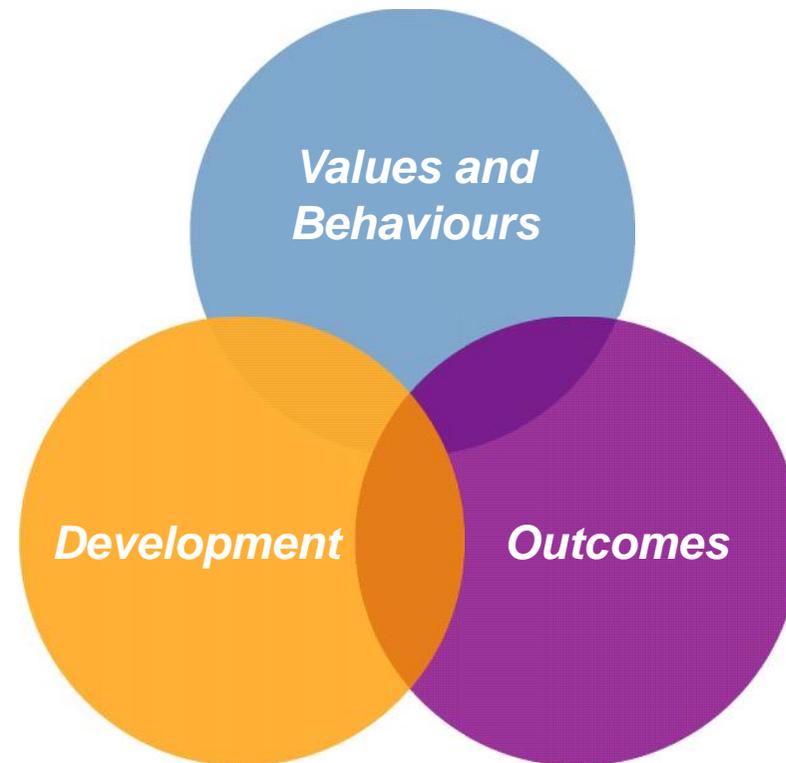
These all come together in the PDR conversation and the way in which the conversation is conducted is critical to gaining a positive outcome:

Outcomes – individuals and teams set stretching objectives and to work hard to realise the best outcomes they can for the people they work with and for.

Values and behaviours – individuals and teams balance the What, with the How, ensuring that the way in which they deliver objectives is consistent with and in line with the spirit of the organisation's values and behaviours.

Recognising individuals for How an objective is achieved is just as important as achieving it.

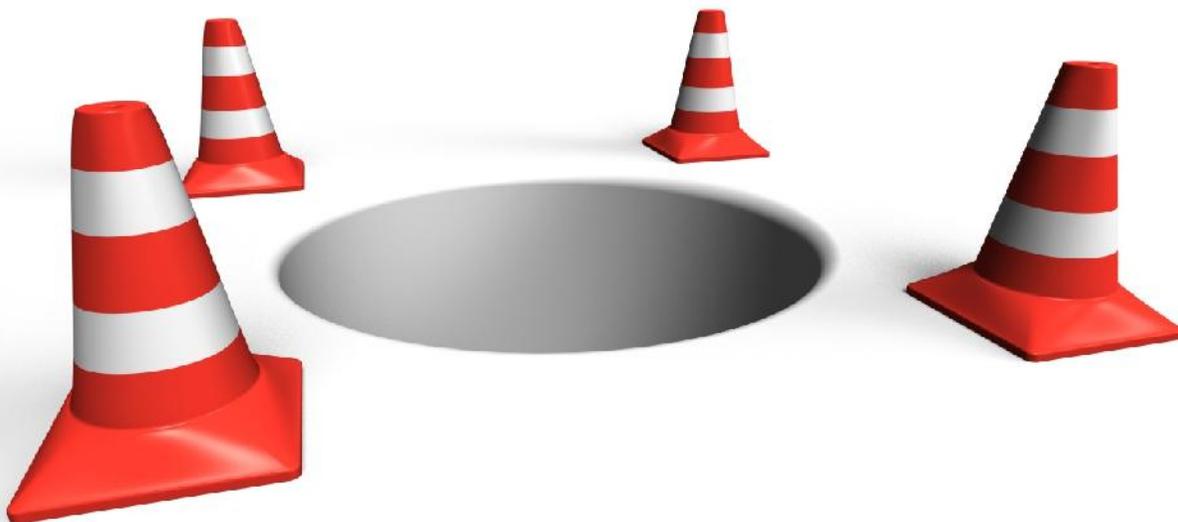
Development – teams and individuals learn and grow through the delivery of their objectives so that they can develop their skills and capabilities, and realise their potential as individuals and teams, and help the organisation to sustain great performance into the future.



Avoiding the Pitfalls

At a glance – Key points to avoid the pitfalls:

- Make sure there are no ‘surprises’ – if either party has significant new information to share, it is better to share the information outside PDR focused discussions
- Remember these conversations are not about the line manager ‘sitting in judgement’ over the team member. The aim is to achieve an open, honest and collaborative discussion that explores the relevant issues and gains agreement to plan and deliver better performance
- Don’t try to raise issues or situations that happened long ago unless they were raised at the time and can be referred back to with a record of what was discussed
- Plan the discussion so that the conversation flows and leaves both people feeling it was time well spent
- Ensure you have a 2-way conversation in which both parties actively participate. This paves the way for meaningful future work and challenges
- Ensure you offer development and support, agree actions and most importantly, carry them out
- Make the person feel valued/appreciated for what they have achieved by thanking them for their efforts, acknowledging and praising achievement and their progress
- Use the following checklist to ensure your discussions achieve a positive outcome, even when there is challenging information to cover:



Preparing for Annual and Interim PDR Discussions

At a glance – Preparation Checklist

1. Prior to the interim or annual review, hold a pre-meeting (see below) to agree a date, time and agenda for the PDR discussion. Identify particular points and issues both parties want to cover.
2. Ensure one person books a suitable room / location for the discussion where you will not be disturbed. Allocate sufficient time for the meeting – approximately 1-2 hours and ensure both of you have enough time for preparation.
3. Review any relevant notes made of 1-2-1 discussions and make additional notes covering what has gone well, what has been learned, progress, achievements, what could have gone better and what could be improved.
4. Both parties – gather any evidence of achievements or feedback from managers, colleagues, and relevant stakeholders to illustrate the level and quality of performance attained – it is easy to do this if you have made some notes during the year that will help you to recall all those occasions.
5. Be prepared to give feedback – this includes upward feedback to your manager, this is a chance for you to give feedback about how you have been supported by your manager throughout the year – so near the end of the meeting the manager should plan to ask for feedback on their own performance.
6. Both parties to summarise strengths and development areas, which is useful input when agreeing development actions (see the SWOT template in Appendix 4).
7. Both parties – review overall progress against the current set of objectives, which may have been updated from the ones set at the beginning of the year, if circumstances have changed.
8. Both parties – frame some thoughts on what objectives should be proposed to cover the next 12 months.

Pre-meeting

To ensure you are well prepared for the formal PDR discussions, it is best practice to hold a short 'pre-meeting' in advance of the PDR discussion. This should cover:

- A reminder of what the PDR discussion is intended to achieve (confirming both parties have a shared understanding)
- The input required from both parties (including reviewing previous objectives/development objectives, etc.)
- The desired outcomes of the PDR discussion
- Where relevant, reflection on future objectives
- Any particular issues/points you (manager or team member) need to be aware of
- Agreement as to what you will prepare in advance of the discussion..



Review of objectives

During the interim or annual review meetings, you will need to discuss achievement against previously agreed objectives. To do this effectively, both you and your line manager need to have prepared by reviewing the list of objectives, gathering evidence of achievement against the agreed success criteria (the **What** – showing how the objectives have been completed) and gathering evidence of the ways in which the organisation's Values and Behaviours have been demonstrated in the achievement of the objective (the **How**). You will need to think about how you measure achievement of the objective – based on the success criteria you agreed and also where the objective has not been met, the reasons for this.

It is useful to record notes throughout the year that you can use to help you when gathering evidence of achievement. Notes can be written at any point and so are useful for capturing information following 1-2-1 meetings as well as your interim and annual reviews.



Use the following points to help you review objectives

- Review each objective one by one and make notes on progress against achieving the objective. Incorporate any relevant information obtained from colleagues or fellow managers to help you build a fair and accurate picture.
- Using the relevant success criteria, define whether, from your perspective based on the information available, the objective has been met. If it has, note down on what basis – how you have measured achievement. Where it has not, make detailed notes explaining why.
- Note down examples of how the Values and Behaviours have been evidenced in delivering the objective. If it has not been possible to demonstrate the Values and Behaviours in the way intended, think about why this is the case? What could you do to change this?
- Check whether any support which was agreed at the time of setting the objectives has been provided. If, as manager, you have not managed to secure support to help your colleague develop particular skills in relation to achieving an objective, this will need to be explored during the review conversation
- Think about your learning from the experience of working to deliver these objectives (both as manager and team member). How will you draw on this experience as you prepare to discuss a new set of objectives for the forthcoming year?
- Bring these notes with you when you hold the PDR review discussion and be ready to discuss in order to establish the final, agreed position.



Completing a SWOT as part of the preparation process

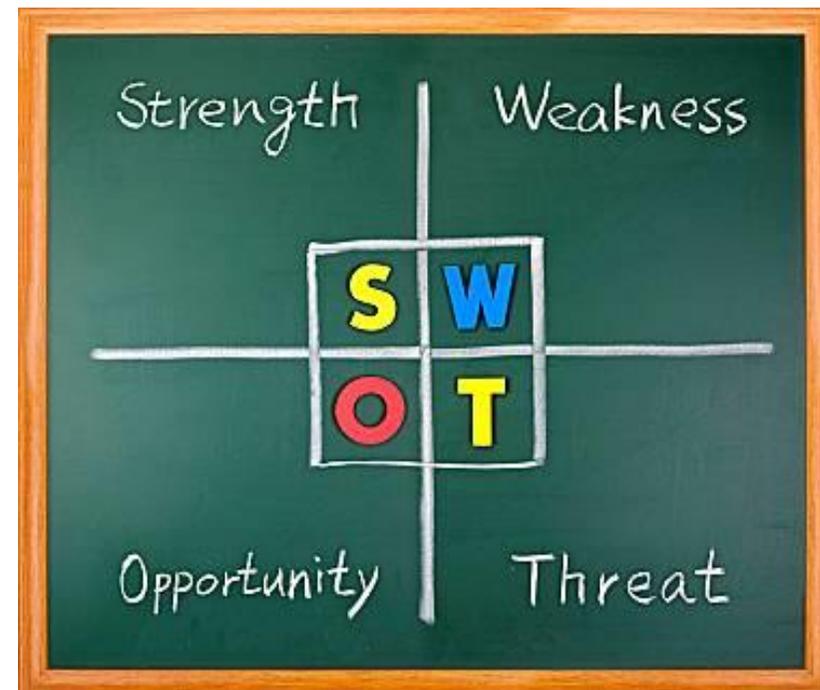
(See **Appendix 3** for an example of a SWOT Template)

A structured review tool such as a SWOT analysis is an ideal way to prepare for an annual or interim PDR discussion. It is an effective way of identifying and reflecting on an individual's strengths, development areas, future opportunities and frustrations – i.e. what may be holding them back or getting in the way of them doing a good job.

Notes that either person has made during 1-2-1 discussions or other reviews can also be used as evidence of progress and performance during the PDR conversation, and either added to the SWOT or taken along as examples when required to explain a specific situation.

Hints and Tips

1. When completing the SWOT and PDR forms, concentrate on recording the What (what was done) AND reflect on the How (how it was delivered = Values and Behaviours)
2. Think about career aspirations in the short, medium and long term ready for the personal development discussion
3. If 1-2-1 meetings have been regularly carried out during the year, there should be no surprises. In addition the preparation for the annual PDR discussion should be relatively easy, since it will largely consist of summarising the overall progress during the year, rather than concentrating on operational details.



Preparing evidence of the organisation's Values and Behaviours

During the meeting, you may need to discuss how you have 'lived' the organisation's Values and Behaviours in your day to day work. To help you prepare, use the following suggestions:

1. For each of the Values and Behaviours, identify an example of where you have used / witnessed the Value / Behaviour in action – whether used positively or negatively. This could be in delivering an objective or your other accountabilities and responsibilities.
2. If possible, identify what using the Value / Behaviour did to improve the quality of the activity or interaction
3. to explain a specific situation.



An example of evidence

KPI Data Collection Process

One of my objectives required me to implement a new process to capture relevant information from team A and team B on a monthly basis to evidence our team KPIs. Demonstrated the behaviour in the following way:

- *Set up focus groups whilst planning the data collection process and forms to capture views from key stakeholders in team a and team b*
- *Based on their feedback from the meetings, presented a set of draft electronic templates for their feedback and comment*
- *Incorporated the comments before designing the final forms ready for the agreed go-live date*
- *After 2 months of data collection, asked stakeholders for further feedback now that they'd used the forms 'for real' on two occasions*
- *Obtained 2 pieces of very important feedback and made final changes to electronic templates which have now successfully run for 6 months.*

Made me realise the importance of asking for additional feedback once the process had started to bed-in. This identified issues the users did not foresee when we ran the focus groups and the users mapped out their preferred process structure.

Conducting the PDR Conversation

On the day, it is important to ensure that everyone involved is in the right frame of mind – i.e. prepared, not preoccupied by any crisis (work or outside work) and with an open, receptive frame of mind.

To open up the meeting the manager should outline what is planned – i.e. how long the meeting will last, what they are going to cover and what the outcomes should be (i.e. a set of agreed objectives and an agreed development plan).

PDR Conversation – suggested structure

An easy to use structure for the meeting is 'REEACB'. The different stages are set out on the following pages:

Recognise	<p>The manager should start by <i>praising and recognising</i> what the colleague has achieved and anything else that has gone well in terms of meeting or exceeding expected levels of performance. This might include additional tasks or challenges that are not directly linked to the actual objectives.</p> <p>Aim: To put the colleague in a positive frame of mind and get them to also acknowledge their strengths and how powerful these can be. It is also an opportunity for the manager to say a well meant 'thank you' for hard work and persistence as well as achievement.</p>
Empathise	<p>Ask the colleague to give their perspective of their performance over the review period (since you last had a formal discussion). Ask them what has gone well from their perspective and what they could have done better. Get them to analyse their own performance. <i>'Listen and learn'</i> – do not judge them. If you listen effectively, this will tell you whether or not the colleague has accepted your positive feedback or has a different view of their own abilities. Summarise how they have assessed their own performance to ensure you have understood their point of view. If not, clarify and summarise again.</p> <p>Aim: By empathising with the colleague and showing them that you see their point of view you are building rapport with them and preparing the ground for the next 2 stages, in which you hope they will reciprocate by understanding your point of view.</p>

<p>Encourage</p>	<p>Encourage the colleague to think about <i>what they need to improve, and where they would like to develop further</i>. For someone who is struggling to meet their targets, this is an important chance to see if <i>they</i> recognise the problem and can see the solution, or whether they lack the motivation to either want to do better or want to fix the problem.</p> <p>Now is also the time to start to think of what is to come – the next period (before the next Annual PDR discussion). Encourage the colleague to explore <i>what they believe they need to work on during the next period</i>. The manager may need to help by setting some additional context around any future organisational plans.</p> <p>Aim: For the colleague to explore areas they can improve and how they can contribute to delivering business objectives. If the individual can come up with their own solutions, they will be far more prepared to own the implementation than if the manager has told them what is needed. Note any actions that either party agrees to complete. Again don't be judgemental.</p> <p>For an individual who is over achieving their objectives, this part of the conversation may veer towards more of a career development conversation.</p>
<p>Ask</p>	<p>If the colleague has not identified key improvement areas, the manager should now <i>ask or suggest areas for improvement</i>. It is also the time for the manager to <i>explore objectives they need the colleague to work on over the coming period</i>.</p> <p>When focusing on suggested areas for improvement, support these with reasons and evidence. Provide suggestions as to how skills and behaviours can be developed.</p> <p>This <i>'principle of reciprocity'</i> can be explained as 'In return for listening to you and suspending my judgement, I have earned the right to suggest some other ideas for you to consider' (see <i>Robert Cialdini 'Influence – the Psychology of Persuasion'</i>).</p> <p>Aim: To jointly identify and explore areas for improvement and agree actions for the forthcoming period.</p>

Coach

Now that both parties have focused on areas for improvement and actions for the forthcoming period, the focus is on how both parties can make this happen. Coaching based questions (where the manager helps the colleague to explore options or ways to deliver these outcomes) are the most effective way to achieve this.

Explore options using questions such as ‘what could you do about that?’ / ‘what might you be able to do to change the situation?’ / ‘what alternatives are there to that approach?’

Explore the colleagues ‘will’ to change and move forward using questions such as ‘which options do you prefer?’ / ‘what is the next step?’ / ‘when could you do that?’

Make sure that the conversation includes discussion about support and development – whether about skills development in order to deliver new objectives / accountabilities or help to enable the colleague to do their job better. Use the coaching questions to encourage the colleague to come up with their own ideas about how support can be provided. See the PDR Development Planning section below.

Aim: To help your colleague move from ideas and aspirations to planned actions using coaching based questions.

Build

The last stage can mean the difference between success and failure as it refers to the ability of the manager to instil a sense of confidence in the colleague. This may vary from colleague to colleague – some may only need to be shown the direction to take, for others it may mean a great deal more support and encouragement to give them the level of confidence to go and ‘have a go’.

Be careful ***not*** to go back to recognition of past actions – the emphasis at this stage in the conversation is to ***build confidence in their future success.***

Aim: To help the individual make the changes that you have jointly agreed and know that whatever the outcome, they have your support.

The REEACB structure

This structure will ensure that the following areas have been covered:

- You jointly review progress and record this against the objectives to ensure it is in line with expectations
- Feedback is given, received, reflected on and discussed by both people in a manner that encourages both of them to continue to offer it
- Success is celebrated!
- The progress of development actions is checked and reviewed
- Performance plans are reviewed to ensure they are still relevant and achievable
- Further support from the manager or others is agreed
- Looking forwards, both people agree any revised objectives or possible changes, resolve issues, etc.

Where can I use the REEACB structure?

The REEACB structure can be used in any performance conversation, whether it is the Interim or Annual Review or whether it is a regular 1-2-1 conversation.

Anywhere you want to check progress with a team member or a colleague, use the REEACB structure to ensure you have a productive review conversation.

Meeting	Check Progress	Give Feedback	Agree Way Ahead
Annual PDR Review	<ul style="list-style-type: none"> ▪ Review and summarise last 12 months' work ▪ Give appropriate praise and recognition 	<ul style="list-style-type: none"> ▪ Highlight strengths with evidence ▪ Give constructive feedback on development areas and discuss future development 	<ul style="list-style-type: none"> ▪ Set objectives for new year ▪ Agree development plan for next period
Interim PDR Review	<ul style="list-style-type: none"> ▪ Review progress in first 6 months of new year ▪ Encourage and motivate 	<ul style="list-style-type: none"> ▪ Recognise achievements so far ▪ Support further development and own involvement/support 	<ul style="list-style-type: none"> ▪ Inspire and motivate continuing effort ▪ Carry out development actions
Regular one to one meetings	<ul style="list-style-type: none"> ▪ Review current work and ensure colleague knows where their performance is, relative to objectives or standards 	<ul style="list-style-type: none"> ▪ Give feedback as and when required as soon after the action or behaviour is observed 	<ul style="list-style-type: none"> ▪ Agree actions to be taken to continue positive progress on tasks and when developing new skills, etc.

What if things go wrong or we need to have a difficult conversation?

There may be times when we need to share some challenging feedback or re-iterate some performance concerns which have been discussed previously.

Equally, things may go wrong leading to either the manager or colleague feeling uncomfortable or aggrieved. See the section ***Dealing with difficult conversations*** in Appendix 1 for more information.

Recording progress and outcomes using the online PDR system

It is important as you work through both the interim and Annual PDR conversation reviewing each objective that you keep a note of your conclusions, agreeing how successful you have been in delivering against each objective, in achieving the What, and the How, living the values and behaviours. At the end of the Annual Review it is also important to agree and record an overall joint assessment of how the year has gone.



Interim Review: After you have met with your manager for a PDR conversation, you should record the conclusions you reached against each objective, and add any agreed new objectives or make agreed amendments to existing objectives, and submit these for your manager to add their comments and sign off.

Annual Review: At annual review, your plan for the year is finalised which involves four steps after your meeting:

1. You record your final overall assessment of how the year has gone.
2. Your line manager records final agreed conclusions against each objective.
3. Your line manager records an overall assessment of the year.
4. Once the three steps above have been completed your plan is signed off by your line manager and as it's finalised, cannot be amended further.



PDR Development Planning

Agreeing Development Actions

A vital part of any PDR discussion is the development planning discussion where manager and colleague discuss and review support and development to help the colleague be more effective in delivering their accountabilities and objectives.

That support can take many forms, from a short “this is how you do x” conversation to work shadowing to a formal course.

Use these steps to help you define and agree development actions and populate the fields in the system:

During the PDR discussion, ensure that in one part of the discussion, you address the question “given what we have discussed in terms of your role over the coming year, your objectives and your accountabilities and responsibilities, Is there any support we can provide that will help you do your job more effectively?” If you are using the REEACB conversation structure shared above, this question would fit into the Coaching section.



Explore any areas of development that arise and answer the following questions:

- a) What exactly will the proposed development address – what will be different if the development support is provided?
- b) How will you measure success or improvement – how will you know the learning intervention has been successful?
- c) How will the learning be incorporated back into the workplace?
- d) Does the proposed development relate to a Personal Objective? If so, how?
- e) When does the learning activity need to be completed by?
- f) How can the support be delivered? For example – personal development (reading or e-Learning), buddying, work shadowing, mentoring, coaching, action learning, training workshop or course
- g) Could anyone else in the team benefit from the same support?

Get agreement as to who will do what – even if you need to get additional information and revisit development planning at a later meeting, make sure you gain mutual commitment – a verbal contract!

Taking a personal interest in the development of the team

It is a well-researched fact that teams where the line manager takes a personal interest in the development of his / her team members, achieve higher levels of performance and engagement. This involves following up agreed development actions to make sure that what has been agreed is delivered and taking a personal interest in how the learning is incorporated back into the line management relationship. Use the following pointers to help you:

The key skills to being a more developmental manager include:

- Being personally involved in development activities – e.g. coaching, mentoring and setting challenging tasks or projects with others, even people not in your own team
- Always finding time to give support when it is asked for, but not always giving the answers, rather coaching the person to find their own answers
- Seeking and giving constructive and timely feedback (see How to guide – Giving and Receiving Constructive Feedback)
- Acknowledging that every individual is unique and therefore being able to flex their management style to take this into account
- Taking a personal interest in people and their ambitions and working with them to achieve them.

Following up Development Actions

This final step of any PDR discussion is vital. It's easy to agree to do things, but ensuring they are done involves a different set of behaviours.

A recent study by Marshall Goldsmith and Howard Morgan found that:

- Where there is no follow up, over 60% of people make minimal or no change or improvement to their skills or behaviour
- Where there is consistent follow up, over 50% of people achieve sustained positive behavioural change.

All this goes to show the value of having a continuing dialogue with your manager and colleagues, not just at 1-2-1 meetings, but at any suitable opportunity.

Ongoing review and feedback helps us celebrate success as we get positive reinforcement of the behavioural changes we have made and helps keep us 'on track' should we be finding the change difficult to sustain.



Regular 1-2-1 Meetings

The PDR process is not only comprised of annual and interim reviews, it is a live 365 day per year environment, all of us working to deliver our objectives each day of the working year. As such, the regular 1-2-1 review meetings we have with our line managers are key to ensuring we all remain on-track.

Whilst 1-2-1 meetings are more informal, they are valuable opportunities to check-in on progress against objectives, share problems or concerns, gain support to tackle difficult issues and build confidence.

You are strongly encouraged to discuss and review progress against your objectives, to share stories of how you are living the organisation's Values and Behaviours and follow up on development actions each time you meet with your line manager.

Ideally, make some short notes of the discussion as a reminder of what you explored – these are really helpful when you come to the Interim and Annual PDR discussions.

Final Checklist

- Get agreement as to who will do what
- Each party should state to the other what they are committing to do and by when – make each other a verbal 'contract'
- Make notes and share them either through your PDR online tool, or by email as required
- Add to the notes as you work on the actions such that you can bring the documents back to populate the next PDR review discussion
- Ask for further feedback and volunteer it at relevant moments.



Appendix 1 – Additional conversation structures to help you conduct an effective PDR Discussion

Dealing with Difficult Conversations

There will be occasions when you need to have a difficult conversation as part of the PDR discussion, where you need to raise concerns, address problem performance or constructively challenge in order to resolve issues. These concerns could be raised by both parties – the manager or the colleague.

It is strongly advised that neither party raise entirely new issues in a PDR discussion, especially new issues around performance or behaviour. Instead, you are encouraged to deal with performance or behavioural issues as they arise, but where relevant, make reference to them in the PDR discussion, especially where there are ongoing actions to resolve the concern or problem which need to be documented as part of the PDR process.

Where you do need to have difficult conversations, follow these steps:

- Begin by giving the context
- Describe the problem behaviour / action
- Say why it is a problem
- Explain the impact
- Ask for their perspective
- Encourage them to explore alternatives – ways to improve performance next time
- Once they are exploring alternatives for themselves, add-in your own suggestions
- Give them some encouragement – build their confidence – be supportive!



What to do if someone is being negative and things go wrong?

If feedback is received negatively or your colleague rejects the feedback, they are likely to experience **SARAH** – here's how:

SHOCK – when we receive information we're not expecting or we react negatively to something, we tend to experience shock or disbelief.

ANGER – we are then likely to experience some level of anger – an emotional reaction to what has been said or the experience someone has had of our actions.

REJECTION – anger is likely to give way to rejection – we don't want to believe the feedback we have received or the observations someone has made, how our actions have made them feel. At this point, if things are difficult, it may be helpful to adjourn for a moment – to let the dust settle.

ACCEPTANCE – once both parties have calmed down and rational discussion can recommence, we need to give further example of the behaviour / action, examples anchored with evidence – when it happened, what happened, the impact of the actions. In doing this, we help our colleague to make sense of what they did and how it made others feel or act.

The following skills will be helpful here:

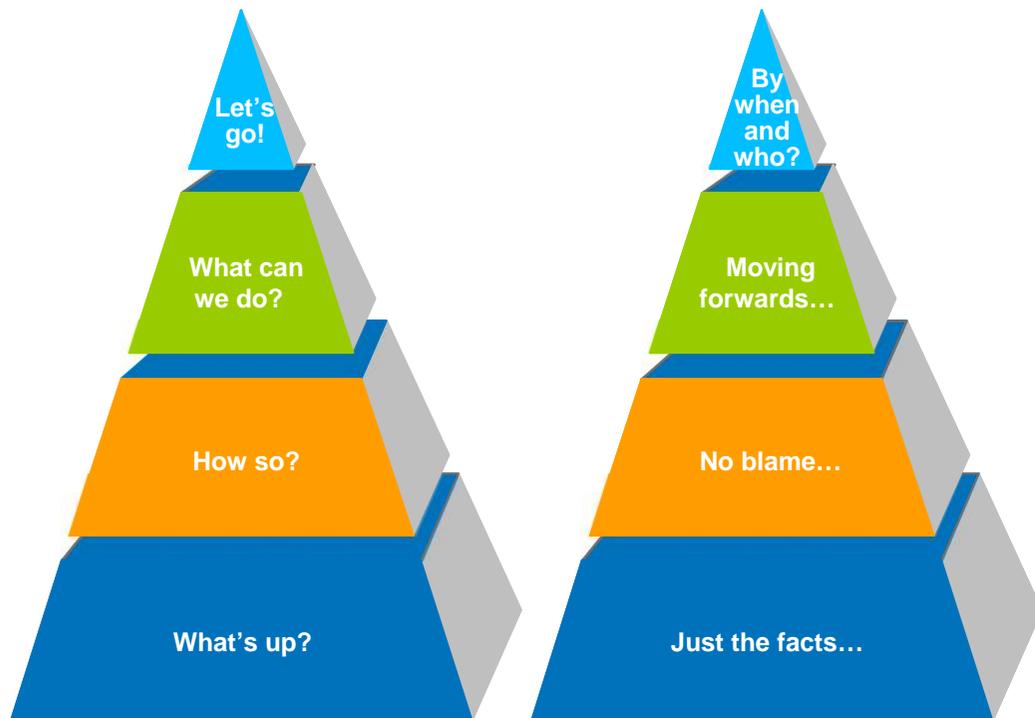
- Listen actively – let them talk
- Show empathy and demonstrate you are listening – paraphrase and reflect back what you've heard
- Acknowledge them, acknowledge their feelings
- Express your views without provoking and if necessary, reaffirm the fact that you are offering feedback to help them improve their performance at their invitation – it is their choice if they accept the feedback and use it.

HOPE – once both parties have made sense of the situation, the final stage involves developing a plan to put things right. Agree what each party will do and how you will follow up to make sure things get done and the situation / issue is resolved. Build their confidence in their ability to change and succeed.



Accountable Conversations

To help your PDR conversations go well, use the structure below to hone your questioning technique to gather the information you both need and get the responses you want from the other colleague. It is particularly helpful in the Empathise and Encourage sections in the REEACB structure:



This model gives you a way of opening up a line of conversation about a difficult subject that neither individual may find very comfortable.

- What's up? This question (or similar ones) encourages the colleague to open up and give you the facts. Ask questions and summarise their thoughts, but don't jump in with your views or comments yet
- How so? Get a bit more background to fully understand the situation by asking further probing questions. As above, clarify and summarise but do not apportion blame
- What can we do about that? The most powerful question in the world! Encourage the colleague to think of as many options as possible. Note the use of 'we' to give your support and get both of you on the same side
- Let's go then! The call to action – i.e. get down to what the colleague is actually going to do about the task/issue/problem and how the manager might support them.

This model is a very powerful way of getting from problem to action and is commonly used in a coaching context.

Appendix 2 – Resources to help you plan Development

Performance is acknowledged to be a combination of ability plus motivation plus the opportunity.

This neatly encompasses all aspects of development, which might involve any of the following:

- Learning about, improving, or perfecting a skill or behaviour
- Getting to know enough about a subject or being exposed to an experience that makes you motivated to do more of it, know more about it, get more involved in it, or simply work harder at it
- Being inspired by someone or something to want to know more or get more involved
- Seeing an opportunity for you to pursue something you are good at, have always wanted to be involved in, or want to try out for the first time
- Seeing someone else succeed at something that has made you realise that 'I could do that'.



How we learn

Our learning preferences are important factors in planning our personal development. Everyone has a *learning preference* and for most development situations, it is appropriate to blend several methods of learning in order to gain the most value.

If you do not know your **preferred learning style**, think about how you tend to do the following things, which might give you a clue:

1. **How do you best remember instructions to get to a new location – do you:**

- a) Draw or find a map to refer to?
- b) List the directions step by step so you can follow them on paper
- c) Hope that someone else will tell you where you need to go next?
- d) Just set off with a vague idea of where you are heading for and try to navigate your own way there.

2. **How would you approach putting together a piece of Ikea type furniture – do you:**

- a) Read the instructions then start at step one to put it together, reading every step at least once before doing anything
- b) Ignore the instructions because it is easy to see how it fits together, so you just dive in and get on with it
- c) Get all the bits sorted out so you can check whether everything is there and then follow the written instructions very carefully
- d) Study the diagrams and start to put it together, but don't refer to the written instructions because the diagram explains it quite well enough.

3. **You have joined a club to learn a new activity – do you:**

- a) Watch the club members for the first session and refuse all offers to join in
- b) Read up on the activity beforehand to find out as much as possible before you try it
- c) Find the expert and stick with them so they can help you to learn and improve
- d) Turn up and have a go and learn by your mistakes
- e) Get some help to get started, but try to work out for yourself how you could improve from your first attempts.

As you can see, there is no right or wrong answer, but people all learn in different ways and at varying speeds. Some prefer **visual** cues (e.g., diagrams), some more **auditory** (following instructions or listening to an explanation), others prefer just to dive in and have a go (**kinaesthetic**), learning from their mistakes.

Coaching conversations using the GROW Model

Learning or developing a new skill or behaviour, or creating or improving the desire to do something new or better than before, involves 4 stages:

1. Identifying what you want to achieve – i.e., what success looks like – and how this will help you.
2. Comparing this with where you are now to get an idea of the size of the task.
3. Agreeing exactly how you are going to close the identified gap and what help you need.
4. Actually getting on and doing it!
5. A developmental model that will help you to cover all 4 stages of the conversation is commonly used in coaching and is called the GROW model.

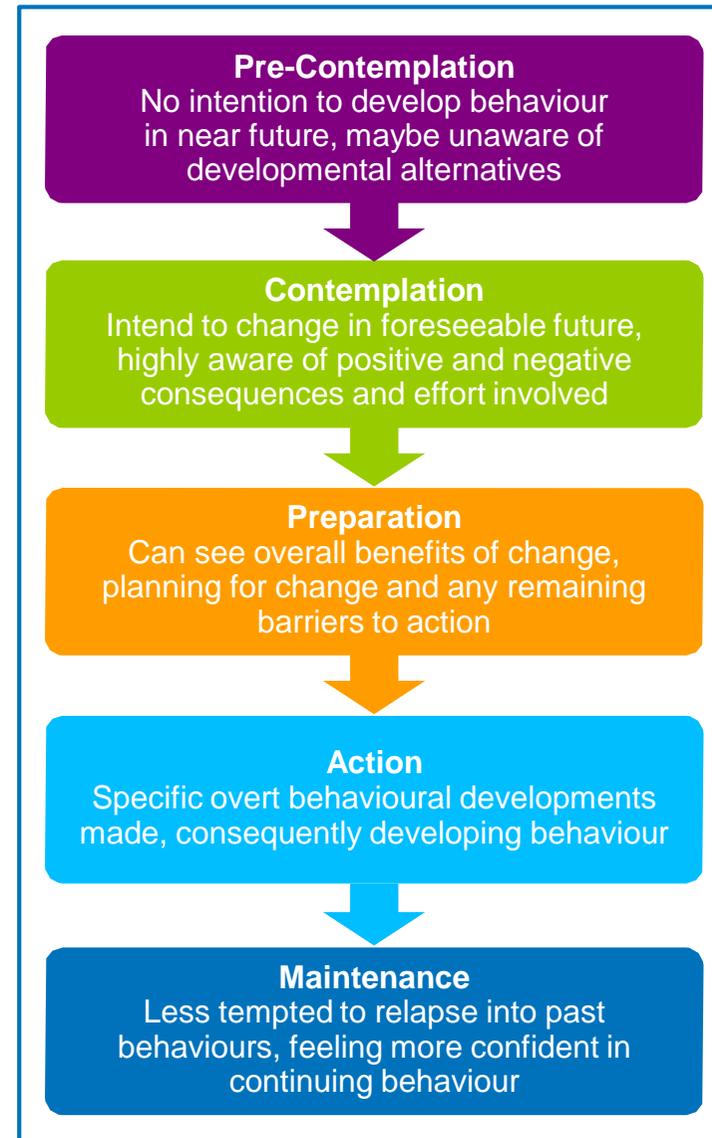
Goal	What do you want to achieve
Reality	Where are you now
Options	How are you going to close the gap?
Will	When are you going to start?

The development conversation can flow in the direction outlined below:

- Utilise any feedback given during the review of performance to identify key areas for improvement (identifying the Goal)
- Once a goal has been agreed, then work through each stage of GROW, asking open questions to get the individual to work out what they need to do to improve
- Make sure the individual 'owns' the development – test this out by asking questions to test their motivation is there during the 'Will' stage
- Offer support as you think appropriate, but don't take ownership of the development – the individual needs to take some of the initiative and responsibility for achieving the outcome. Give feedback as they progress and review how their performance has changed
- Be aware that individuals need time to learn and apply new skills and behaviours and motivations as well as the right opportunities. Performance may also dip briefly before you see any actual improvement. Find opportunities for the colleague to try out and embed the new skills and encourage with plenty of further feedback.

Developing or Improving a Behaviour

The PDR process encourages us to focus on and develop particular Behaviours. The following model helps us understand more about behavioural development, how we move from a 'steady state' position unaware there are better ways of using a particular behaviour, through a series of stages where we identify the more advanced (effective) way of using the behaviour, take action to develop it and eventually ensure this higher level becomes the new 'steady state':



Appendix 3 – SWOT Template

OBJECTIVES	ACHIEVED Y/N	COMMENT
STRENGTHS – skills or behaviours you currently do well	DEVELOPMENT AREAS – skills or behaviours you would like to improve	
<ul style="list-style-type: none"> ▪ Be realistic and not modest – what are you good at? ▪ See your strengths from others' (including patients or colleagues') points of view as well as your own ▪ How can your strengths help the organisation or others? 	<ul style="list-style-type: none"> ▪ What do you know you need to improve? ▪ What do you avoid doing or know you do badly? ▪ How relevant/urgent are your weaker areas to your success in the role? ▪ How do others regard these areas of weakness? 	
OPPORTUNITIES – ideas for how you could develop or exploit your current strengths further	FRUSTRATIONS – skills and behaviours you need help to develop, to do a good job	
<ul style="list-style-type: none"> ▪ How could you exploit your strengths to your or the organisation's advantage? ▪ What opportunities do you see that you could leverage to your advantage if certain changes take place? ▪ What areas would you like to experience that would give you relevant skills for your next career move 	<ul style="list-style-type: none"> ▪ What gets in the way of you doing a good job? ▪ What do you need help to sort out/improve? ▪ Are there any potential changes that you see as posing a problem for you in the future? ▪ What challenges can you see in the next 12 months that will impact your ability to do a good job? 	
PROPOSED NEXT YEAR'S OBJECTIVES:	DEVELOPMENT NEEDS:	

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