

MIDPOINT GOAL CHECK-IN CONVERSATION EMPLOYEE GUIDE

Introduction

The midpoint goal check-in, led by the employee aims to review completed goals and potentially change goals, as needed. The manager supports the discussion by actively listening, providing feedback and support.

Review Completed Goals

- ◆ **Celebrate achievements:** highlight completed goals and summarize what went well.
- ◆ **Analyze results:** discuss outcomes and impact, confirm continued alignment with team objectives.

Address each of the remaining goals separately as the approaches taken for completion may vary.

Discuss Ongoing Goals that are On Track

Goal setting occurs at the beginning of each fiscal year and include two types of goals:

- ◆ **Assess progress:** Review the status, highlight the successes. Confirm that the plan for completion is still relevant.
- ◆ **Address challenges:** Discuss the root causes and agree on potential solutions to keep the goal on track.

Address Incomplete Goals

- ◆ **Identify reasons:** Explore the reasons behind incomplete goals. Are there conditions outside of your control, or could additional support or re-prioritizing workflow help to get the goal back on track?
- ◆ **Revise, replace or omit:** If a goal has become unattainable or is no longer aligned with organizational priorities, consider the option to revise, replace or omit it.

Revise, Replace or Omit a Goal

- ◆ **Identify unforeseen changes:** Discuss the impact of resource constraints, or changes in priorities to determine if the goal is still achievable and results oriented.
- ◆ **Discuss new expectations:** When a goal is changed, collaborate and agree on changes to expectations, deadlines or deliverables. Be sure that you and your manager agree on all changes.
- ◆ **Embrace change:** Discuss the options and agree on an approach to either revise, replace or omit a goal. Maintaining open communication to respond to organizational shifts and adapt to external changes is a collaborative process that supports ongoing alignment.

Conclusion

The midpoint goal check-in meeting is a dynamic approach to goal management that is responsive to change. It helps ensure that goals remain relevant, achievable, and contribute to overall success of both the individual employee and the organization.

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Date: _____

Use the guiding questions in each section to lead a conversation with your manager about the progress you've made on the goals you set for this performance cycle. Use active listening skills to engage in a collaborative discussion and seek feedback. Discuss each goal separately and confirm or revise your plan to ensure its completion.

OPEN

Describe purpose and importance. What expectations do I have for this conversation? How will I organize my comments to lead the conversation?

CLARIFY

Seek and share information, issues and concerns. What questions or concerns do I need to address before we start discussing each goal?

DEVELOP

Review each goal and revise, replace or omit, as needed. Identify needed resources/support. What will I say to share my perspective on the completion status of each goal? What resources/support might I need?

AGREE

Confirm the plan to track and measure progress and achieve goals. How will I ensure my manager and I have the same understanding of my results? How will I summarize my next steps?

CLOSE

Confirm confidence and commitment. What will I say to express my continued commitment to achieving the goals?