

# MIDPOINT GOAL CHECK-IN CONVERSATION MANAGER GUIDE

## Introduction

The midpoint goal check-in, led by the contributor, 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

- ◆ **Assess progress:** Review the status, highlight the successes. Confirm that the plan for completion is still relevant.
- ◆ **Address challenges:** Encourage open communication about challenges. Understand the root causes and collaboratively strategize on potential solutions to keep the goal on track.

## Address Incomplete Goals

- ◆ **Identify reasons:** Explore the reasons behind incomplete goals. Are there conditions outside the contributor's control, or could additional support or re-prioritizing workflow help 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.
- ◆ **Communicate expectations:** When a goal is changed, collaborate and agree on changes to expectations, deadlines or deliverables. Ensure agreement between you and the contributor 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 contributor and the organization.

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Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_

Use the guiding questions in each section to facilitate a conversation that the contributor leads about their goal progress. Demonstrate active listening skills to foster a collaborative, transparent exchange that supports their success. Check off any relevant Key Principles to use to meet their personal needs to feel valued and involved in each stage of the conversation.

	<b>Key Principles</b>
<b>OPEN</b> <b>Describe purpose and importance.</b> How will I describe the importance, and the benefits of this conversation? What will I say to encourage the contributor to lead the conversation?	<input type="checkbox"/> Empathy <input type="checkbox"/> Esteem <input type="checkbox"/> Involvement <input type="checkbox"/> Share <input type="checkbox"/> Support
<b>CLARIFY</b> <b>Seek and share information, issues and concerns.</b> What will I say to invite the contributor to share any questions or concerns they may have before they review their goals? What information do I need to share as we begin?	<input type="checkbox"/> Empathy <input type="checkbox"/> Esteem <input type="checkbox"/> Involvement <input type="checkbox"/> Share <input type="checkbox"/> Support
<b>DEVELOP</b> <b>Review each goal and revise, replace or omit, as needed. Identify needed resources/support.</b> What will I say to seek the contributor's perspective on their goal progress? What resources or support will I offer?	<input type="checkbox"/> Empathy <input type="checkbox"/> Esteem <input type="checkbox"/> Involvement <input type="checkbox"/> Share <input type="checkbox"/> Support
<b>AGREE</b> <b>Confirm the plan to track and measure progress and achieve goals.</b> How will I ask the contributor to summarize the plan for goal achievement? How will I ensure we mutually understand and agree on next steps?	<input type="checkbox"/> Empathy <input type="checkbox"/> Esteem <input type="checkbox"/> Involvement <input type="checkbox"/> Share <input type="checkbox"/> Support
<b>CLOSE</b> <b>Summarize the importance of your combined work. Confirm confidence and commitment.</b> How will I summarize the impact and importance of what we discussed? What will I say to express my confidence in them?	<input type="checkbox"/> Empathy <input type="checkbox"/> Esteem <input type="checkbox"/> Involvement <input type="checkbox"/> Share <input type="checkbox"/> Support

**NEXT STEPS:** Schedule the initial follow-up meeting. \_\_\_\_\_

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