



Performance Counseling Preparation For **SUPERVISORS**

Providing purposeful performance counseling sends a powerful message to your Members - it lets them know leadership cares about their development and future success. Preparation for a successful and engaging performance counseling session, whether it be at the midpoint of the periodic report cycle or when the report is signed, cannot be overstated. These preparations will set you up for a robust performance counseling session as well as meet the desired criteria.



STEP 01

SCHEDULE THE SESSION

- Set aside at least 30 minutes to conduct the session.
- Give formal notification at least a week in advance so the Member will have time to prepare.
- Communicate the purpose so that the Member understands the objectives.

REVIEW THE RECORD

- Set aside time to review the materials the Member provided.
- Examine the Member's self-appraisal, performance goals, job responsibilities, and career milestones.
- Consider input from the Chain of Command.
- Determine whether the Member is performing to or not achieving expectations.
- Develop a course of action that will move the Member closer to the desired performance.

STEP 02



DEVELOPMENT/TRAINING

Determine any opportunities for development or training and when it should be pursued.

- What opportunities exist if the Member is falling short in an area?
- When should it be pursued? For instance, does the Member need a 'C' school for career progression? When should this occur?
- What is the next developmental or training opportunity that would be most helpful to the Member?
- Be proactive in setting up your Member for success.



STEP 03

SELF-REFLECTION

Take a moment to self-reflect and consider your role in facilitating or impeding the Member's progress.

- How have you been a roadblock to the Member?
- Do you always say "No"? Does your own bias or judgement get in your way? Or have you been supportive?
- Be prepared to discuss alternative methods to help the Member reach their goals.

STEP 04



PLAN TALKING POINTS

Plan a few talking points and come up with some questions to ask the Member.

- Create a rough outline and set goals for the items you would like to discuss.
- Provide feedback that the Member can act on.
- Note strengths and areas to improve.
- Address specific performance problems, concentrating on ways to develop in these areas.
- Plan for silence from the Member and what you might say to keep the conversation moving by preparing thought-provoking, open-ended questions to spark discussion.



STEP 05



Performance Counseling Preparation For **MEMBERS**

Because performance counseling conversations are not one-sided, you as the Member have a responsibility to come prepared to discuss your performance with the Supervisor. This is a valuable opportunity for you to receive honest, candid feedback regarding your work, the identification of strengths, areas in need of improvement, and opportunities to enhance performance. Let's look at what the Member needs to do to prepare for the performance counseling session.



STEP 01

COMPLETE SELF-APPRAISAL/IDP

Complete a self-appraisal using the appropriate form: EVAL, CHIEFEVAL, FITREP, or Individual Development Plan (IDP).

- Include your strengths, areas for improvement, and your professional goals in blocks 33-39 on your performance evaluation.
- Assess your performance to date.
- Note any required resources to adequately complete your tasks and achieve your goals.

REVIEW THE RECORD

Gather information related to your performance for the period.

- Include specific data on military activities and accomplishments.
- Highlight a few talking points for areas of discussion.

STEP 02



SELF-REFLECTION

Take a moment to self-reflect and consider the amount of effort you are putting into your performance and who could support you.

- How often did you do your best?
- How often did you ask for help?
- What would you do differently in terms of your performance?
- What else could you do to meet your performance goals?



STEP 03

TALKING POINTS/QUESTIONS

Plan a few talking points and come up with some questions to ask your Supervisor.

- Create a rough outline and set goals for the items you would like to discuss.
- Respond to feedback that the Supervisor provides.
- Note strengths and opportunities for improvement.
- Address specific performance concerns, concentrating on ways to develop in these areas from your perspective.
- Prepare a few questions for the Supervisor.

STEP 04



HAVE AN OPEN MIND

- It's important to go into performance counseling with an open mind.
- You're going to receive lots of feedback so decide how you want to use this feedback to improve your performance.



STEP 05