

## Effective & Meaningful Remote Performance Conversations

*This is a companion job-aid for the recorded learning session linked here.*



### To get started, review these Achieve Together key features.

#### Achievement Criteria

- Achieve Together includes new guidelines for all non-represented employees and managers/supervisors called the Achievement Criteria.
- There are five (5) performance indicators; collaboration, goal accomplishment, inclusion & belonging, innovation, and job mastery.
- Visit the [Achievement Criteria page](#) to learn how to use the document to discuss, plan, and evaluate performance based on the five (5) indicators among three levels of performance: Needs Attention, Well Done, and Stand Out.

#### Check-in Conversations & Coaching Model

- Achieve Together includes three (3) check-in conversations. These are conversations between managers/supervisors and direct reports.
- Check-in conversations include six (6) guided starter questions that help us discuss:
  - Current and future work expectations for the five (5) performance indicators in the Achievement Criteria, including collaboration, goals, inclusion & belonging, innovation, and job mastery.
  - Accomplishments, what's going well, and areas for improvement, and professional development planning.
- Be sure 1:1 meetings are scheduled with repetition between Achieve Together check-in conversations to revisit expectations, respond to changing priorities, discuss progress, exchange feedback, and refine strategies for success.
- Visit the [check-ins page](#) to learn the recommended steps for before, during, and after conversations.
- Making a plan to address current and future work is key! Use the [coaching model](#) and [Growing as a Coach toolkit](#) to prepare.

#### Goal Setting Includes More Flexibility

- Goals can be set for any length of time (1mo, 2mos, 4mos, 1yr, 2yrs).
- Managers are responsible for managing performance, including assigning goals that align with unit priorities, are clear, time-bound, measurable, actionable, and attainable (though a challenge).
- Goals are revisited in ongoing 1:1 meetings to discuss progress and refine goals as priorities change
- Goal outcomes and updates to goals are documented in three (3) Achieve Together check-ins.
- At any time, non-represented employees will have 1 professional development goal (new knowledge, skills, experiences, or activities for career growth), with the remaining 2-4 goals focused on job accountabilities, special projects, challenging/stretch assignments, or broader contributions to Cal.
- Check out the Achieve Together goals page to learn more about [goal setting](#).

## For remote performance conversations to be effective and meaningful, managers/supervisors and direct reports use familiar fundamentals in a different way...

### Everyone wants performance conversations to be helpful and productive.

These conversations give us the chance to check-in on communication and working styles, preferences, and how we can best support one another in doing our work.

### Planning for conversations about performance, engagement, and development takes participation, role clarity, and planning.

More frequent meaningful conversations create space to build and rebuild trust.

A thoughtful, supportive, individualized approach is key.

Performance conversations should always include recognition for accomplishments, opportunities for improvement, and planning around what's next.

### Use the UC Berkeley coaching model to navigate conversations about future work.

Discover → Explore → Plan → Act

Great coaches ask thoughtful open-ended questions, guide and partner, encourage and enable ongoing growth.

Highly coachable people seek feedback, take responsibility for their performance, and embrace better ways of working.

Use the [coaching model](#) for conversations about performance, feedback, problem-solving, and professional development.

The model gives everyone a framework to explore and discover opportunities to make action plans for expectations; whether it be about collaboration, goals, inclusion & belonging, innovation, or job responsibilities.



## Prepare, connect, follow up...

### Keep the lines of communication open

Open communication helps everyone better understand challenges, wins, and results. Ongoing communication creates opportunities to build, sustain, and rebuild trust.

Frequent conversations make for a familiar environment in more formalized performance discussions.

### Remote conferencing etiquette

Check-in on remote conferencing platform preferences (Zoom, Google Hangouts, etc.).

If able, connect via live video, instead of just audio. To decrease ambient or background noise, keep the microphone on mute when not talking.

Acknowledge and contribute to non-verbals (head nodding, hand raising, looks of confusion or disagreement).

Allow and plan for moments of silence to embrace thinking and give participants time to respond.

### As a manager/supervisor, avoid hoarding time in the conversation. As a direct report, this is the time to showcase work.

Managers/supervisors have the role of facilitator, to reflect back what direct reports are saying, and summarize. This is a great opportunity to ask open-ended questions and partner for success.

Direct reports have the space to highlight their work, to identify strategies for future work, and to truly “own” their performance with the manager/supervisor as the helpful guide to maximize potential.

### Exchange feedback, though avoid blindsiding employees with surprising criticism.

Be up-front about the type of feedback that will be shared. When delivering, be factual, concise, and compassionate.

Incorporating feedback as part of regular 1:1 meetings builds a culture of honesty and transparency.

Think about using questions like: *what worked well? What were your take-aways? What could be different for next time? How can we work together to support future success?*

### Lean-in to challenging conversations. Avoidance could make things worse...

Make a plan, communicate intentions, and plan for improvement opportunities.

### Take the temperature! Get on the same page for following-up on progress.

Follow up on progress by making informal check-ins a habit. Check-in about how things are going over gchat, a 5m Zoom meeting, text, or phone call.

## Conversation checklist

- Have I created an outline of talking points where the bulk of the review is on strengths, and any areas for improvement are put into context?
- Have I identified examples that demonstrate strengths?
- Have I identified possible action steps for areas of improvement?
- Have I identified concrete examples that demonstrate the impact of any performance issues?
- Have I ensured I have a plan for next steps?
- Have I clearly identified expectations for goal completion?

## Resource and support guide

Description	Type
<a href="#">Effective &amp; Meaningful Remote Performance Conversations</a>	Recorded Zoom microlearning session (video & audio)
<a href="#">Effective &amp; Meaningful Remote Performance Conversations</a>	Recorded Zoom microlearning session (audio only)
Achieve Together: <a href="#">Ask Us Anything</a>	Event
Book 1:1 <a href="#">performance coaching/consulting session</a>	Support sessions
Learn about Achieve Together Key Features: <a href="#">Check-in Conversations</a> , <a href="#">Coaching</a> , <a href="#">Goals</a> , and the <a href="#">Achievement Criteria</a> .	Achieve Together webpages
<a href="#">People &amp; Organization Development Curated Tools Relevant to COVID-19</a> (view managing remotely)	UC Berkeley curated resources
<a href="#">What makes a remote performance conversation meaningful and effective?</a>	“Ask the People & Organization Development Experts”
<a href="#">Remote Coaching &amp; Developing Performance</a>	UC Berkeley curated LinkedIn Learning collection (videos & training)
<a href="#">Setting and Achieving Goals with Adaptability</a>	UC Berkeley curated LinkedIn Learning collection (videos & training)
<a href="#">Managing/Coaching Remote Employees (Gartner - Manager/Supervisor Guide)</a>	Slide deck
<a href="#">Employee Guide: Working on a Virtual Team (Gartner)</a>	Slide deck
<a href="#">Managing Remote Employees During the COVID-19 Outbreak</a>	Article