

# A Checklist for Employee QTP's

*Increasing the frequency and quality of employee performance conversations remains a priority for most companies today. The more employees and managers are able to communicate, the better they will be able to work together to accomplish goals, develop skills, and give/receive feedback. But where to start? We've prepared some key discussion points and conversation starters that managers could use to make the most of QTPs with employees.*



# Conducting Effective Quarterly Touch Point Meetings with Employees

Increasing the frequency and quality of employee performance conversations remains a priority for all of us today. It's how we ensure we are successful with our goals!

Regardless of the frequency of these conversations, their purpose remains the same: to keep the lines of communication open between managers and employees in order to effectively engage and manage performance.



# Conducting Effective QTP Meetings with Employees

The more employees and managers are able to communicate, the better they will be able to work together to accomplish goals, develop skills, and give/receive feedback. Although Quarterly Touch Points (QTPs) should appear relatively casual to employees, managers should follow a loose structure in order to make sure this time spent remains valuable and drives action.

We thought it would be handy to prepare a checklist of discussion points and conversation starters that managers could use to make the most of the QTPs with employees.





# A Manager's Checklist for QTP's

# Before the Meeting: Prepare

Nothing is worse than going into a meeting with a manager that is not prepared or like they aren't invested. Take 5 minutes to prepare before the meeting or your call. If you are using a central location or tool for goal tracking, feedback, and/or journal/meeting notes, managers should easily access review those notes and quarterly performance.

- ☐ Review any notes taken during the last meeting to get up to speed on any planned deliverables.
- ☐ Review the employee's list of goals and projects to see if there are any due or running off course.
- ☐ Make a note of important department or company changes that need to be discussed.
- ☐ Review any feedback sent/received to identify any discussion points.
- ☐ Unplug from other activities so the employee knows they have your complete focus.



# During the Meeting: Possible Discussion Points

- The bonus of quarterly check-ins with employees is that managers **don't need to discuss everything** in each and every touchpoint meeting. Remember, your most comprehensive QTP will be #4.
- They can select specific goals, projects, or coaching points to focus on in each meeting. Your employees might also start the conversation and guide the focus (**even better**).
- Generally, managers and employees should **prioritize discussion points** based dates and progress. What is discussed will actually change meeting-by-meeting

# Sample Employee QTP Discussion Points



## 1. Get Your Employee Talking!

- ☐ Use conversation starters to engage the employee in conversation
- ☐ Use open-ended questions to keep them talking (Tell me..., Describe for me..., Explain for me...?)
- ☐ Let the employee guide the conversation but make sure you discuss any important items



## 2. Goal/Project Updates

- ☐ Discuss the status of short-term goals and long-term projects
- ☐ Adjust/update existing goals (Wildly Important Goals)
- ☐ Discuss any challenges or lessons learned
- ☐ Offer coaching and/or assistance for any roadblocks
- ☐ Discuss if any other priorities might affect the goal progress
- ☐ Ensure all goals are still on track
- ☐ Acknowledge any milestones or accomplishments!
- ☐ Discuss/confirm any new goals for the employee





# Sample Employee QTP Discussion Points



## 3. Recent Accomplishments

- ☐ Acknowledge recent accomplishments and provide feedback
- ☐ Ask the employee for any recent accomplishments



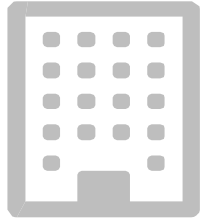
## 4. Status of Training and/or Development activities

- ☐ Discuss any training items due/in progress
- ☐ Ask the employee if there are any training requests
- ☐ Ask if the employee feels they are getting enough feedback
- ☐ Ask if the employee is learning from peers/mentors or if they would like to
- ☐ Recommend training items to improve skills and further career
- ☐ Review and update your IDP (Individual Development Plan)



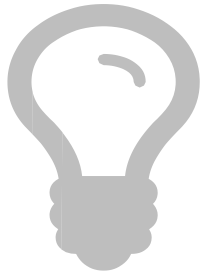


# Sample Employee QTP Discussion Points



## 5. Company or Team Updates/News

- ☐ Acknowledge recent accomplishments and provide feedback
- ☐ Ask the employee for any recent accomplishments

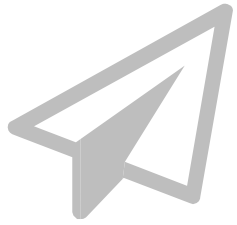


## 6. Employee Ideas/Requests for Change

- ☐ Ask the employee for any ideas/input
- ☐ Discuss any areas in need of change (company, team, project etc.)
- ☐ Ask the employee if your management style is effective for them and get suggestions for change
- ☐ Discuss any overall roadblocks or distractions that might be affecting the employee



# Sample Employee QTP Discussion Points



## 7. Employee Career Development

- ☐ Discuss employee's career goals
- ☐ Discuss how you can work together to achieve their career goals
- ☐ Discuss opportunities and career paths for the employee



## 8. Plan for the Next Quarter

- ☐ Review the priorities for the short and long term to keep goals on track! Set up your next meeting



# Conversation Starters: How to Keep Your Employees Talking



# Conversation Starters: Keep them Talking!

Some employees are more reluctant to speak-up but this doesn't mean that a manager should do the bulk of the talking. There are simple ways to get the employee to talk and keep talking during the QTP meeting. Remember, this meeting is about them. The more they talk, the better for everyone.

- “ Tell me about your week/month – what's it been like?
- “ Tell me about what you've been working on?
- “ Where do you think I can be most helpful?
- “ Are you on track to meet the project deadline?
- “ What areas are ahead of schedule?
- “ What questions do you have about this area of responsibility, or project?
- “ How are you going to approach this?
- “ What have you learned about this area of responsibility, or project?
- “ What didn't go as you had hoped? Why?
- “ What can you/we do differently next time?
- “ What suggestions do you have?



# Questions to keep the conversation going...

Here are some tried and true questions to keep employees talking.

“Go on....”

“Tell me more...”

“Why do you say that..”

“How do you mean...”

“Can you give me an example...”

“What else...”



# At the END of the QTP Meeting: Summarize

Before your employee leaves the meeting, spend a few moments to **summarize the key discussion points**.

This will help remind employees of any action-items and reinforce any acknowledgement or coaching tips provided.

Ask the employee if anything was missed and remind them of when the **next meeting** will be.

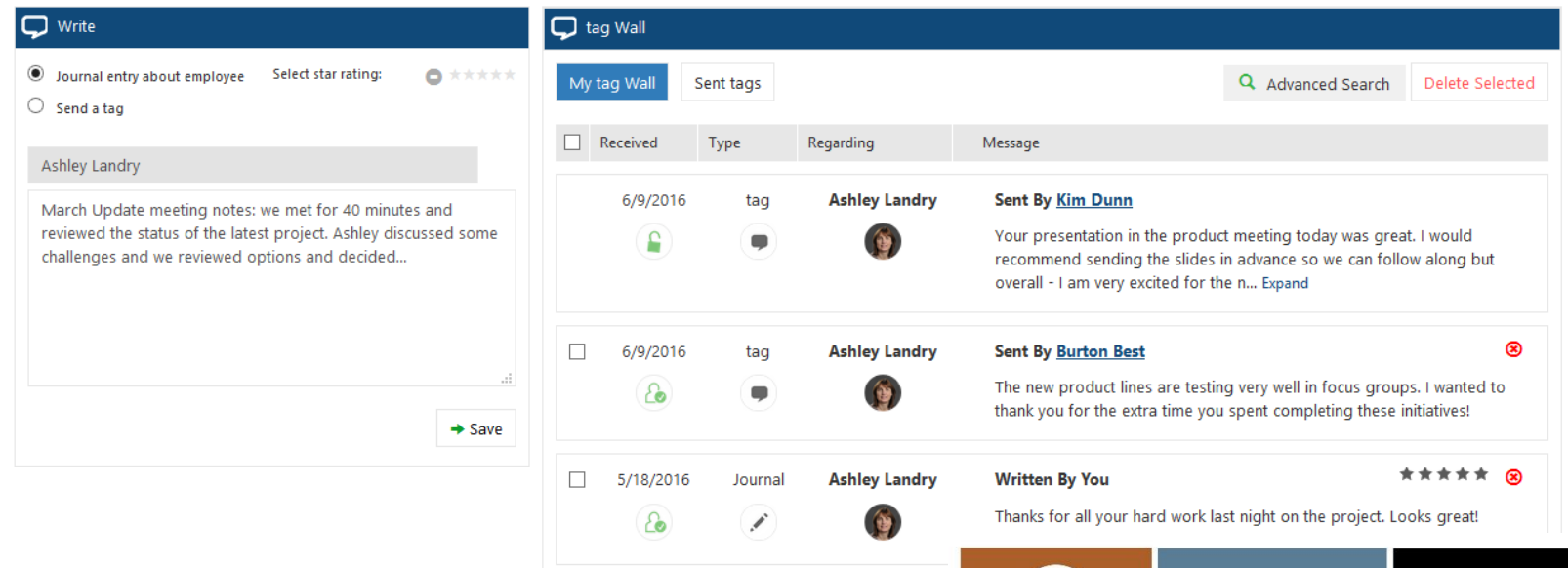
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# AFTER the Meeting: Document

This very small but significant step is often skipped and yet can make a big difference. **Take 2-5 minutes after each meeting to record key discussion points, action-items or feedback.** This will help kick-start the next meeting and will serve as a useful log when managers are looking at trends in performance. Keep these notes in a centralized location. The performance feedback and journaling feature inside emPerform can be a great help.

Hint: Managers who make 1-2 notes about each employee per month shaved 50% of the time off of entering year-end comments during the final annual review!



**Write**

☒ Journal entry about employee    Select star rating: ★★★★★  
☐ Send a tag

Ashley Landry

March Update meeting notes: we met for 40 minutes and reviewed the status of the latest project. Ashley discussed some challenges and we reviewed options and decided...

[Save](#)

**tag Wall**

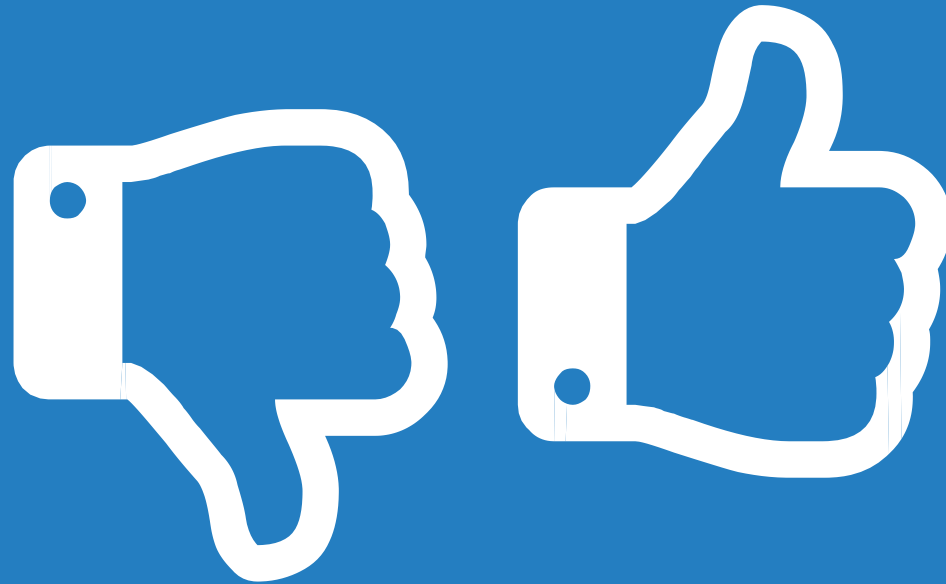
[My tag Wall](#)    [Sent tags](#)    [Advanced Search](#)    [Delete Selected](#)

<input type="checkbox"/>	Received	Type	Regarding	Message
<input type="checkbox"/>	6/9/2016	tag	Ashley Landry	<b>Sent By Kim Dunn</b> Your presentation in the product meeting today was great. I would recommend sending the slides in advance so we can follow along but overall - I am very excited for the n... <a href="#">Expand</a>
<input type="checkbox"/>	6/9/2016	tag	Ashley Landry	<b>Sent By Burton Best</b> The new product lines are testing very well in focus groups. I wanted to thank you for the extra time you spent completing these initiatives!
<input type="checkbox"/>	5/18/2016	Journal	Ashley Landry	<b>Written By You</b> ★★★★★ Thanks for all your hard work last night on the project. Looks great!





# How Did You Do?



# How Did You Do?

Perfecting employee QTPs can take some time. Even the most seasoned managers need to develop this skill continually. Take a few moments after each meeting to evaluate how you did.

- ☐ Did you talk too much/not enough?
- ☐ Did you actively listen?
- ☐ Did you ask questions?
- ☐ Did you paraphrase key items to confirm understanding?
- ☐ Did you provide effective coaching tips?
- ☐ Were you distracted in the meeting?
- ☐ Do you believe the meeting was valuable?
- ☐ Did you discuss all important points?
- ☐ What could you do to improve the next meeting?



# Keep it Up!

Overall, frequent touchpoints with employees is a must to ensure clarity, provide coaching, and offer the support needed for an employee to **succeed**. Although finding time in the day is a challenge for many managers, QTPs are time well spent and will pay dividends in the long run for both the manager, your employee, team, and the company.

