



Mindset Memo

Strategic Plan – Jayne Doe

Updated: 04/22/2022

Competency Training Topic: Giving Feedback

Goal

ACHIEVED BY JULY 15th

1. Provide regular and helpful feedback to my direct report (Brian).

- Set a specific SMART Goal for Brian's Salesforce growth to be achieved by July 10th.
- Look for and call out positive items regarding Salesforce task completion for Brian at least twice a week in an informal way
- Hold formal feedback session each month citing no less than one area of improvement and correction.
- Use K.I.S.S. formula in this session.

FAIL POINTS

- Brian is using Salesforce but data is inaccurate.
- Brian receives feedback but does not make necessary changes.
- Brian is unable to train others on this Salesforce task.

30-Day Execution (these are your 30-Day To-Do's)

TO BE ACHIEVED BY May Training Session

- Set SMART goals for Brian's Salesforce growth. Meet with Brian to go over these goals together.
- Note and call out at least two positive items per week regarding Brian's work in Salesforce.
- Hold one formal feedback session with Brian and use the KISS (Keep, Improve, Start, Stop) formula to cite at least one area of improvement (I) and one area of correction (Start or Stop) addition to positive areas (K).

FAIL POINTS (for 30 day execution)

- I set SMART goals and communicated them to Brian, but he did not understand the expectation.
- I noted Brian's improvement twice a week, but I did not do so in a way that Brian felt that this improvement was appreciated.
- I held a feedback session with Brian but I was unclear about expectations so Brian left the meeting feeling more confused than ever.