

# Review and Career Conversation

## User guidelines for individuals and reviewers



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**The Review and Career Conversation**

## What is it?

The Review and Career Conversation provides a structure for individuals and their reviewer to have regular conversations. It is intended to combine appraisal, career conversations, review of health and wellbeing and personal development planning into a series of regular and joined-up conversations.

The conversation is based upon the following principles.

* the quality of the conversation is the first priority,
* its focus is individualised, humanistic and based on the person, their role and their career,
* it happens frequently and is complimented through regular one-to-ones
* it assumes the person’s life, career, motivations and performance are subject to change
* it promotes an adult and respectful relationship between the individual and their employer

**and what it is not…**

* A way of categorising people or putting them in a box
* A judgemental process that makes rigid assumptions about people’s future
* A way of dealing with performance issues or having difficult conversations

## Who is it for?

The Review and Career Conversation has been designed to be used for employees at all levels, regardless of their professional background. It is a personal and individualised conversation that enables people to reflect upon, discuss and agree where the individual is at a given point in time.

A degree of flexibility is built into the conversation in order for it to be relevant and meaningful for different individuals. This includes options:

* to agree short or long-term objectives depending upon their role,
* for using the behavioural or leadership qualities most relevant to their role;
* for those who wish to link this with other Leadership Academy tools we have provided guidance and suggestions towards the end of this document.

## How often does it happen?

Given the changes occurring at work and in life, it is recommended that elements of this conversation form part of an ongoing dialogue with your reviewer. The review of your goals and objectives for example could form part of weekly or monthly one to ones. Ideally a light touch review happens at least once a quarter with a more in-depth conversation at least every 6 months.

**Preparing for the conversation**

## Your preparation

You and your review may find the conversation easier to have if it is spread across two separate meetings. Starting with sections 1 – 3 in one meeting and then returning to discuss and agree on sections 4 – 5 is a natural way to split the conversation. Generally, it is best to ensure that the gap between these meetings is no more than a fortnight.

To maximise the quality of the conversation and benefit you derive it is recommended that you take some time to reflect and work through a number of the sections of the conversation in advance. It is anticipated that this may take 30 mins to 60 mins, but that in return the conversation will be more focused, of higher quality, and should also be shorter. The elements you will need to prepare for include:

*Section 1 - About me*

Complete all of this section on your own before you meet with your reviewer. You can choose to share this with your reviewer beforehand or wait until you meet.

*Section 2 – Reviewing my goals and objectives*

Summarise the goals and objectives agreed during your last conversation in this section. You can always refer back to the detailed notes taken during your last conversation if they are needed at this next meeting. You may also find it helpful to rate your progress against each of these and share your ratings with your reviewer before the meeting, but this decision needs to be reached between the two of you.

*Section 3 – Reviewing my behaviour*

Rate yourself against these behaviours before the conversation and reflect on any high and low points. Once again it is for you and your reviewer to agree what is shared in advance of the meeting.

*Section 4 – Reviewing my career*

Reflect and capture your thoughts on this section before you meet. If you are interested in moving to another role now or in the near future, then completing the Reviewing My Current Motivation and Potential section will also helpful.

## Reviewer’s preparation

You may find the conversation easier to have when it is spread across two separate meetings. Starting with sections 1 – 3 in one meeting and then returning to discuss and agree on sections 4 – 5 is a natural way to split the conversation. Generally, it is best to ensure that the gap between these meetings is no more than a fortnight.

To keep the discussion focused and maximise the quality of the conversation it is recommended that you also complete the following sections of the Review in advance. It is anticipated that this will take you approximately 30 minutes.

*Section 2 – Reviewing my goals and objectives*

Refer back to the goals and objectives agreed during your last conversation and rate each of them. It can be helpful for each of you to share your thoughts and ratings before the conversation, but you will need to agree this between you.

*Section 3 – Reviewing my behaviour*

It is recommended that you rate the individual’s behaviours in advance of the meeting. It can be beneficial to canvass other people’s thoughts and feedback beforehand, but always check that the individual is happy for you to do this.

*Section 4 – Reviewing my career*

If you know that the person you are meeting is interested in exploring other career options at this point and is completing the Reviewing My Current Motivation and Potential section, then you will also need to rate them against these criteria.

**Having the conversation**

1. ***‘About me’***

*Recommended time allocation for this section: 10 mins – 30 mins*

The conversation begins with an opportunity for you to reflect and discuss how satisfied you are in your role and how well this fits and balances with life outside work. You are also encouraged to think about the work that you find most rewarding and energising and how much you currently get to experience this. To get the most from this section you may want to go through the following steps.

1. Start by indicating where you are on each of the 6 scales. Then take some time to reflect upon your scores and what they mean to you. You may find it useful to consider which out of these elements matter most to you. Also reflect on which direction you think things are going on each scale i.e. are they improving or getting worse.
2. This isn’t an exhaustive list and you may think of other factors that are affecting the balance between your work and home life. If this is the case, then you can take the opportunity to write these down on the same page.
3. Next, take some time to reflect on the type of work that you are most passionate about and find most rewarding. Also think about how much opportunity exists within your current role for you get involved in this type of work or apply your strengths.
4. Finally, give some thought to the practical steps that you could take over the next 2 – 3 months that would make a make noticeable difference to the quality of your working life. You may find it helpful to consider how your manager, colleagues, friends or family could support you in taking these steps.
5. Be sure to include any goals or actions that you might want to apply at work in section 5 when agreeing your development goals.
6. ***‘Reviewing my goals and objectives’***

*Recommended time allocation for this section: 15 mins – 30 mins*

Reviewing successes and progress is a vital part of any review conversation. This section provides you and your reviewer with the opportunity to establish how much progress you have made in relation to your development goals and work objectives.

1. Before the conversation starts, make sure you have summarised the goals and objectives agreed during your last conversation. Also take some time to reflect on how you think you have done or are doing in relation to each of these.
2. During the conversation you and your reviewer can then discuss these in turn, using the rating scale to indicate the extent to which they have been or are being met. If you and your reviewer were specific about expectations when these were agreed, then it should be clear to each of you what rating is appropriate. If, however, there are areas where you are unable to agree, then you can indicate these on the rating scale. It is important to acknowledge at this point that there are sometimes valid and fair reasons why certain objectives have not been met. Your manager may for example have asked you to prioritise other activities. If this is the case, then this should be captured at the bottom of the page.
3. Once you have reviewed and rated the objectives you will need to sum up with an overall rating. This provides you and your reviewer with an indication at a point in time about how successfully you have been able to progress in relation to core areas of work and development. You can agree on an overall rating by doing the following:

* Count up the number of objectives under each rating (i.e. the number that are ‘partially or not met’, ‘met’, or ‘exceeded’
* Exclude any ratings where there were extenuating circumstances that meant for reasons outside of your control you were unable to progress
* Place a tick in the overall rating box that has the highest number of ticks above it
* If you and your reviewer are unable to agree on an overall position, then you can indicate your different ratings in the boxes provided.

1. Finally, the two of you can capture any important overall reflections and comments at the bottom of the page. It will also be useful to consider which of the existing / ongoing objectives you will need to include at the end of your conversation (section 5) when agreeing objectives.
2. ***‘Reviewing my behaviour’***

*Recommended time allocation for this section: 15 mins – 30 mins*

This second element of the review enables you and your reviewer to review your style, approach and behaviour. This is designed not just for self-reflection, but also as an opportunity for you to receive feedback from your reviewer and ideally others that you work with. Once completed this can provide you with the insights required to build self-awareness and guide you towards specific development goals.

1. Before the conversation starts, take some time to reflect on how you have been working and the level of frequency with which you have been displaying each of the values or behaviours. People often find the process of self-reviewing themselves against behaviours a valuable process in its own right. In order for both of you to be prepared your reviewer will also need to rate the frequency with which they see you displaying these behaviours.
2. During the conversation you and your reviewer can compare ratings and use these to form the basis of your discussion. The following tips might help you to get the most from this part of the conversation:

* avoid going through every single item one by one. Instead look for patterns and themes,
* areas of agreement and disagreement should not be seen as a conflict, but rather valuable insights in terms of different perceptions that can be explored and clarified using examples;
* lower scoring areas can provide useful insight into potential areas of weakness, although the predominant focus is ideally on areas of strength to nurture and grow.

1. As with the objectives in the previous section, the overall rating is based upon the column with the most ticks. This helps to provide an overall indicator of how aligned your behaviour is to requirements of your role at a given point in time.
2. If you and your reviewer are unable to agree on an overall rating, then use the separate boxes provided and explain the reason for your differences in the reflections and comments section.
3. ***‘Reviewing my career’***

*Recommended time allocation for this section: 10 mins – 20 mins*

This section has been designed to support everyone regardless of their aspirations, to reflect upon where they are up to within their career and to think through their hopes and needs in the short and longer term.

At a given point in time (and for a combination of reasons) most of us are content to stay in our current role. When this is the case we need to reflect upon our level of satisfaction within the role and what can be done to ensure that it becomes or remains worthwhile and fulfilling.

In contrast, for those of us who are clear about needing or wanting to move to another role it is important that we have the opportunity to explore what options exist and how ready and able you are to be able to make this transition.

1. Start by considering which of the two options at the top of the page best reflects your current position. Remember, you can revisit this page (and if necessary, repeat the conversation with your reviewer) whenever you need, but it is important to be honest with yourself about what feels right for you in the moment.

* *For those content to stay in their current role at this point in time…*

If this is where you are today, then the left side of the page will be most relevant to you and the primary focus is about getting the most from your current role. You may find it helpful to reflect back to previous 3 sections and to think about what is important for you to either achieve or be able to do within your role. Also consider what support you may need and how this sits alongside your life outside work. Having discussed the questions on this page, take a few minutes to record your thoughts and then move on to the final section 5 Agreeing Your Goals and Development Objectives.

**…or**

* *For those considering another role now or at some point in the future…*

If you are considering another role then this section will help you to reflect more specifically on what this is and why you are keen to make a transition. Having discussed the questions on the right side take a few minutes to record your thoughts and then move on to section 4.1 Reviewing My Current Motivation and Potential.

1. The next two elements of the conversation (Reviewing My Current Motivation and Potential; and Summarising Current Career Aspirations) have been designed for people considering another role. If you are content to stay in your current role, then these sections will lack relevance for you at the moment and you can now move to the final section of the conversation Agreeing My Development Goals and Work Objectives.
   1. ***‘Reviewing my current motivation and potential…’***

*Recommended time allocation for this section: 20 mins – 30 mins*

This simple self-assessment questionnaire gives you the opportunity to reflect at a given point in time on your appetite and potential to move to another role. Your potential is impacted upon by events in and out of work and also by your current state of mind. This means that it is continuously changing, and it can be helpful to revisit this section at various points throughout the year. There are other ways of gaining insight into your potential e.g. stretch assignments, secondments, and development centres which you may choose to explore with your reviewer.

1. As with other aspects of the conversation you will find it helpful to complete and reflect upon this section before the you meet with your reviewer. It can also be useful to ask them / others to give you some feedback / complete the questionnaire about you.
2. Similar to the review of your behaviour earlier in the questionnaire you are asked to rate how frequently you display a range of behaviours. These behaviours differ from the earlier section as they provide insight into how suited and ready you are to be able to move into another role.

* *Motivational agility*: explores your appetite, ambition and sense of purpose
* *Learning agility*: explores the energy, focus and approach taken to learning
* *Emotional agility*: explores insight and understanding of self and others
* *Thinking agility:* explores decision making, problem solving and flexibility

1. During the conversation you and your reviewer can compare ratings and use these to form the basis of your discussion. The following tips might help you to get the most from this part of the conversation:

* Avoid going through every single item, instead look for patterns and themes
* Areas of agreement and disagreement should not be seen as a conflict, but rather valuable insights in terms of different perceptions that can be explored and clarified using examples
* Lower scoring areas can indicate potential barriers or risks when transitioning to another role and need to be explored
* High scoring areas are of particular importance as developing and sustaining these play a big part in enabling a successful transition into another role

1. The overall rating is based upon the column (i.e. rarely, sometimes, frequently) that has the most ticks.
2. If you and your reviewer come up with different overall ratings, then use the separate boxes provided and explain the reason for your differences in the reflections and comments section.
   1. ***‘Summarising my career aspirations’***

*Recommended time allocation for this section: 10 – 30 mins*

You and your reviewer should use this section to capture and record the key elements of information from the conversation. Whilst this section can form a valuable conversation in its own right, it also provides a summary that can be used to identify opportunities that fit with your aspirations and readiness. You and your reviewer can record your ratings using a tick (in your case) or a cross (for your reviewer).

The quadrants in this section follow a natural order and flow. It is recommended that you discuss and complete them in the sequence described below, finishing with current readiness.

1. Current performance – This is the quadrant to record your overall scores from the review of your goals and objectives; and the review of your behaviour. Together these two elements provide an indication of how you are performing at a given point in time.
2. Current potential – Use this quadrant to record your overall scores from the review of your current potential. Remember this rating is shaped by factors that affect your motivations in and out of work so will be subject to change over the next 6 – 12 months.
3. Current aspirations – This quadrant records the conclusions reached during the review of your career. What you are able to complete at this point will depend upon the nature of your conversation and how clear you are about your aspirations at this point in time. The more clarity you have the easier it will be to explore specific career opportunities. However, this is not a process to be rushed and you may find that at this stage you are still keen to keep your options open. For this reason, you should complete this to the best of your ability, but don’t worry if some of your responses are a little vague at this point, as this can be common experience.
4. Current readiness – It is helpful to complete this quadrant having first discussed the other three. This is the opportunity for you and your reviewer to consider how ready you are to take that next step in your career. This is not an exact science and you can always change your mind. However, it is hoped that through reviewing your performance, potential and aspirations you will be in a more informed place to make a judgement on how ready you are to take on another role.
5. Finally, it is useful at this stage to discuss with your reviewer what the implications are of your conversation and how the information summarised on this page will be used.
6. ***‘Agreeing my development goals and work objectives’***

*Recommended time allocation for this section: 15 mins – 30 mins*

As you have progressed through the conversation you will have identified and agreed short and longer-term goals; this is the place to capture and record these. Summarised below are some tips and advice that may help with this final section.

* As an overall principle you should aim to agree and summarise the most important goals and priorities so that you have no more than 6 split between the short and longer-term sections. As a rule of thumb many people would consider more than 6 too many.
* Depending upon the nature of your role or development priorities, you may want to substitute some of your longer-term goals for short term or vice versa.
* Treat your development goals with the same importance as work objectives and include a combination of each.
* Objectives need to be written in a certain way if they are to be measured and evaluated objectively. Your organisation will have a recommended approach e.g. SMART. If you and/or your reviewer are unfamiliar with this approach, then it is recommended that you are provided with support to learn and apply it.
* Finally, ensure when you finish the conversation that you and your reviewer have your next conversation scheduled and in the diary.

Your organisation will require you to discuss some other elements at this stage including statutory and mandatory training or professional registration. It is helpful for this to form part of the conversation rather than be discussed separately as this may influence the objectives you agree.

**Linking the conversation to other talent management resources**

## The Maximising Potential Conversation Tool

***Background to the tool***

This tool is designed to support individuals and their managers to have constructive conversations about potential and is based on two axes. The delivery of objectives is on the horizontal axis and behaviour is on the vertical. Depending upon what you have delivered and how you have behaved you can place yourself in one of four quadrants or an additional area in the middle of the grid.

***Links to the Review and Career Conversation***

Given objectives and behaviour are reviewed in sections 2 and 3 of the Review and Career Conversation it easy for the Maximising Potential Conversation Tool to be linked or to form an extension to this conversation.

***Reasons for using this as an extension to your conversation.***

* To support managers and individuals to think more laterally about the type of development that could help them to grow in confidence and potential
* To provide suggestions about the type of development interventions that suit the needs of the individual
* To provide managers (particularly those new to their role) with a bit more structure for certain elements of the conversation
* To support managers to find a way of having a constructive and positive conversation even if the individual is clearly struggling with delivery, their behaviour or both
* To provide clues as to how to have a more stretching conversation with people who may be ready or motivated to move into a different role

## The Talent Management Conversation Tool

***Background to the tool***

This tool is designed to support individuals and their managers to have a structured conversation about the individual’s future based upon their ratings (objectives and behaviour) within the Maximising Potential Tool and their readiness to move to another role.

Through using a version of the 9-box grid, which is called the Talent Grid Conversation Tool, this provides the opportunity to place yourself in 1 of 9 categories based upon your overall performance and readiness.

For each position within the grid the tool provides individuals and their managers with a definition of what it means to be there together with a comprehensive bank of questions to help provide further insights. In addition, development considerations, specific leadership development interventions and further possible development interventions are all provided.

***Links to the Review and Career Conversation***

Given objectives, behaviour and readiness are all measured and recorded (section 4.2) of the Review and Career Conversation it is also relatively straight forward for the Talent Conversation Tool to be linked or to form an extension of this conversation.

***Reasons for using this as an extension to your conversation.***

* To tease out and understand the variety for factors that could help or hinder an individual to further develop their potential
* To provide individuals with further insight into where their strengths and capabilities could be best suited i.e. to help them to make the right career choices
* To support managers in having a more exploratory conversation about people’s future aspirations and ambitions
* To identify the right kind of development that fits with the specific needs of the individual