



It's About People, Not Process  
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## How To Have The First Conversation

With the implementation of ENGAGE, the first one-on-one conversation team members and their supervisor will have at the beginning of the year should last roughly 30 minutes.

### The goal of the conversation will be to:

- Confirm the team member's core performance objectives – the everyday tasks that are essential to the team member's job
- Discuss and update objectives if needed
- Identify initial developmental goals for the coming year

### This conversation is also a time to:

- Remind team members why their work contribution is important
- Answer questions; and
- Give and receive feedback

The more team members and supervisors communicate, the better they will be at working together to accomplish goals, champion change, innovate, and grow as individual contributors within their organization.

### SCENE 1: Supervisor (S) and Team Member (E)

S: Well Gwen, I'm glad we have a chance to meet today. Since this is our first ENGAGE meeting, I want to go over and make sure we're each on the same page in terms of work priorities; but also some developmental opportunities for you. I definitely want to receive feedback from you, not just on what I have to share, but on how you can accomplish your goals. So we really do need your input on this. Thanks for remembering to bring your notebook so we can write this all down. These conversations, I think, will be a big help for us so let's dive right in!

E: Great! I'm ready. Let's go!

### Confirm the team member's core performance objectives based upon various sources:

- Position description forms
- Performance criteria provided in previous appraisals or planning documents
- Standardized organizational objectives and priorities
- Human Resources policies
- Previous supervisor and team member discussions

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## **SCENE 2:**

S: To give us a place to start, I thought it would be helpful to review the objectives you had last year. I sent you an email of it last week. I see you brought that with you and I have a copy as well. So I want to go through all the objectives and make sure that we have something that we can both work from.

There were a couple of things I think might work a little better for both of us. So, what do you think?

E: I'm good with the changes you'd like as long as we can make adjustments if we need to.

S: Absolutely. I understand your concern and we can track this in our monthly follow-ups. Anything else?

E: You know, I think it would be better if I could submit my weekly report to you on Friday morning while it's still fresh instead of waiting until Monday afternoon. I'm always afraid I'll forget something. I also think it would be helpful to the project team as well. Would that work?

S: Sure, that's a good idea so let's write that down.

## **Identify initial developmental goals for the coming year:**

Discuss and plan for specific training, ongoing learning, mentoring and work assignments to help the team member learn new skills, develop professionally, and explore new opportunities.

## **SCENE 3:**

S: You know, Gwen, there's something else that I'd like to talk with you about.

E: Sure.

S: You've mentioned that you'd like to increase your customer relations skills and that's definitely something that I'd like to help you with. So what I would like for you to do is take a more lead role in our client conversations to make sure that their expectations and deliverables are in sync. We think this is a really important role for us and critical to our success.

E: I hadn't thought about that. How would that work?

S: Well the next time we get a customer request, I'd like for you to do is take the lead and I'll serve as the back-up. After that, can fly solo and we'll see how it goes.

E: I think I can do that. It sounds interesting, and I would like to try something new. If I have any questions would you be around?

S: Absolutely, the door's always open.

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## **Give and Receive Feedback**

Supervisors and team members should make the most of this initial conversation and all conversations throughout the year by providing feedback to each other on specific ways to improve work processes, complete tasks, and work more effectively with others.

### **SCENE 4:**

E: I know it's important to keep you updated on the new process I'm working on, and you said that you have an open door policy, but it's really difficult. It seems like you're always busy, talking to someone on the phone, or in a meeting with someone else. I don't just want to stand around.

S: Well that's a good point and thank you for bringing it up. You're right, that this is an important thing for us to be doing and we shouldn't leave it up to chance. What if we scheduled it in Outlook? It's an extra step, but I think it might be worth it.

E: Ok, sounds good.

S: Well, I think that just about covers everything for our initial meeting. Let's review our notes just to make sure we haven't forgotten anything. What do you have down?

Before the meeting concludes, both the supervisor and team member should write down pertinent information from the meeting and ask questions as needed to clarify their understanding about what was discussed.

### **Make notes about:**

- Specific feedback or expectations shared in the meeting
- New goals and objectives that were agreed to during the meeting
- Ideas to change or innovate a work process
- Steps needed to implement work expectations or assignments, etc.