90-Day Discussion Template

|  |
| --- |
| About this ResourceThe purpose of the 90-day discussion is to provide a structured opportunity to review progress toward goals, share what’s going well and what could be better (from both of your perspectives), and make commitments for moving forward. Here’s what we think you should cover in the discussion. For more help, see our article, [Tips for Conducting a 90-Day Discussion with Your New Hire](http://www.managementcenter.org/article/tips-for-conducting-a-90-day-discussion-with-your-new-hire/).  |

## Headlines

Start by getting an overall sense of how they feel about their first 90 days. Then, share your headline.

### Sample language:

* “What’s your headline for how you’re feeling about your first three months?”
* For someone whose performance is on track: “I think you’ve done a solid job at settling in, building connections, and doing the work. One thing I’d like to work on with you moving forward is taking more ownership of the work, which is going to be critical for long-term success. Overall, I think you’re on track to meet or exceed expectations by the end of the year.”
* For someone whose performance needs course correction: “Overall, I really appreciate how much energy you’ve put into learning and building relationships and I think there’s potential for success. In order to feel confident in your long-term success, I’d like to see improvement in a few key areas. Let’s talk about what I can do to support you.”

## Progress Toward Goals

**Review their** [30, 60, and 90-day goals](https://www.managementcenter.org/resources/30-60-90-day-goal-setting-template/). If you didn’t set goals in advance, use the chart below to discuss what they worked on in the first 90 days and use the reflection questions below to reflect on progress and share feedback. If you did set goals in advance, have them fill this out in advance or refer to your original worksheet.

|  |
| --- |
| **90-Day Goals — To be completed by XX/XX/XX** |
| **Goal** | **Tactics / Other notes** | **Status** |
| *Get familiar enough with all newsletter publication logistics— platforms, processes, and checklists—in preparation to own newsletter publication in month two.*  | *Attend training with Mari; make time to shadow/observe them preparing for the next newsletter.* | *Done* |
|  |  |  |
|  |  |  |

### Reflection and discussion questions:

* How did you do at meeting your short-term goals?
* How did you do at integrating the “approach” from your [role expectations](https://www.managementcenter.org/resources/role-expectations/) in tackling your work and goals in the last three months?
* To the extent that you’ve been successful, what was most helpful for achieving success?
* Which goals have been challenging to meet, and why? What have you learned that will help you improve your outcomes going forward?
* Are there any next steps you need to take to be on track to meet your annual goals?

## Feedback, Observations, and Reflections

A strong relationship is built on trust and open communication. If you haven’t already been sharing and soliciting regular feedback in your check-ins, this is a good opportunity to do it. Invite their self-reflection and share yours.

* **Feedback for the staff member:**
	+ What are two things you are doing well?
	+ What are two things you’d like to improve or grow?
	+ I think you’ve been doing a great job at…
	+ I really appreciate how you...
* **Feedback for you, the manager:**
	+ What are two things that I (as your manager) am doing well in our work together?
	+ What could I be doing differently/better to support you?
	+ Moving forward, I’d like to better support you by…
	+ Two things I’m proud of having done to support you are...
* Is there anything you’ve observed or experienced about our culture or how we operate that you’d like to share with me?
* Is there anything you think we could be doing to foster more trust and belonging on our team?
* Checking back in about your access needs—is there anything we could be doing to make it easier for you to work and show up with your full capacity?
* Do you have any questions or other feedback to share with me?