

Progress Update Conversation Guide for managers

Progress updates are short-term performance overviews that help people press the “pause” button every few months, take an overview of how they’re doing, and make any adjustments in real time.

PURPOSE: To help each person look back over the last few months and then incorporate this learning into their work going forward.

HOW LONG: Approx. 20 to 30 minutes.

HOW OFTEN: Every one to three months.



To lead a progress update

- To set the scene, open with warmth and recap the purpose.
- Confirm what to cover and timing.

Say something like

This is an important opportunity to reflect on the last [X] months and plan ahead.

What would it be most useful to cover?

O: Outcomes

- Lead with recognition for successes.
- Explore the team member’s main priorities including development goals.
- Help to identify any important patterns in their feedback from others.
- Provide a rough guide to the level of performance they are achieving.

Thank you for your hard work. You’re achieving particular success with...

What are your thoughts about your progress?

What’s going especially well? Where are your biggest challenges?

What feedback is important to act on?

Where, roughly, would you say these results sit on our organization’s scale?

I: Insights

- Analyze the drivers and obstacles behind their performance.
- Explore the impact of the wider environment.
- Explore insights into their own capabilities and actions.

Where things are going well, what are the reasons for this?

Where your results are currently not what you’re hoping for, what’s causing this?

L: Learning

- Explore what learning to take forward.
- Adapt goals as needed.
- Identify where you may need to provide additional support.

What changes will be useful in light of these insights?

How can I help?

Summarize the discussion

- Cover any additional areas such as career development, wellbeing, and promotion opportunities.
- Check for questions.
- Finish on a positive note.