

Manager- Start Development Plan for Employee

USER GUIDE

INTRODUCTION

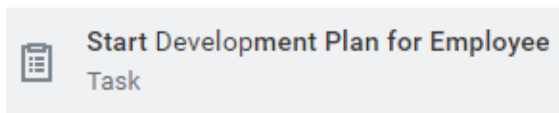
Use this job aid as a resource to complete a Development Plan for an employee. This is also called Coaching/Counseling.

When minor performance or behavior issues arise, managers should conduct informal coaching/counseling sessions to provide feedback on the observed behavior or performance concern(s). These sessions should focus on understanding the employee's perspective, identifying root causes (e.g., gaps in training or resources available to the employee), aligning expectations, providing appropriate guidance, and jointly developing a plan to ensure the performance or behavioral concerns do not continue moving forward.

This template should be used to ensure there is an accurate record of the interaction for both the employee and the supervisor. For a more significant concern or repeated issue, it might be more appropriate to use a disciplinary action such as verbal or written warning.

START DEVELOPMENT PLAN FOR EMPLOYEE

1. Enter in the search bar **Start Development Plan for Employee**.



2. Enter in the name of the employee, select the Coaching/Counseling template and the period start date and end date. This date should match and would be the date the event occurred.

Start Development Plan for Employee

Employee *

Review Template *

Period Start Date *

Period End Date *

3. You will receive a task in your inbox called **Complete Manager Plan**. Click **Get Started**.

4. Before submitting, the informal Coaching/Counseling session should be set up with the employee.

Enter in responses in both fields, the employee will have a chance to review all of this. Specific details such as dates, time, conduct should be included. Click **Next**.

Coaching/Counseling Summary

Before submitting, the informal coaching/counseling session should be set up with the employee.

What was the behavioral or performance concern noted?
Please include specific details on the date(s), time(s), location, and audience as well as impact of the conduct, or potential impact of the conduct if repeated.

Manager
Response *

Please provide details of your discussion and any agreed-upon action steps or timelines for improvement/correction:

Manager
Response *

5. The summary page will be next. Review and make any changes if needed by clicking into the section on the left-hand side. Once done, click **Submit**.

Complete Manager Plan


Actions

07/10/2024 - 07/10/2024

Coaching/Counseling Summary

Review and Submit

6. The manager will receive one last task a "to-do" prior to the employee receiving this. Before clicking Submit, an informal Coaching/Counseling session should have already been set up. If set up, click **Submit**.



Note: For a more significant concern or repeated issue, it might be more appropriate to use a disciplinary action such as verbal or written warning. Use the **Start Disciplinary Action** task. Reach out to HR@co.marathon.wi.us at any time with questions.

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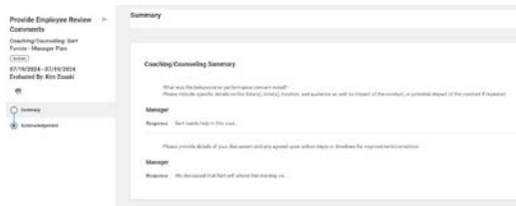
EMPLOYEE RECEIVES COACHING/COUNSELING PLAN

- The employee will receive a task in their inbox to **Coaching/Counseling** to Provide Employee Review Comments. They click **Get Started**.

Please acknowledge that you did discuss the issue(s) outlined with your supervisor.



- The employee will review the information the manager has entered and click **Next**.



- The employee will mark the status as **Acknowledge** or **Acknowledge with Comments** then hit **Submit**.

Acknowledgement

Employee

Status *

Comment Acknowledge Acknowledge with Comments

- The employee and manager can see this on their Profile under Performance, Development Plans right after.

Review	Review Period Start Date	Review Period End Date
Coaching/Counseling: Bert Funnie	07/19/2024	07/19/2024

MANAGER RECEIVES TO REVIEW AND COMPLETE

- This will come back to the manager to review any comments (if applicable) and then hit **Submit**. This process is now complete.

Acknowledgement

Manager

Status *

Comment