

# How to lead a great mid-year conversation

## Mid-year conversations enable you to reflect on your team member's performance so far.

Mid-year conversations take place in May each year.

While you won't be giving your team member a performance rating, your team member should leave the conversation...

- Feeling clear about how they are performing
- Knowing what (if anything) they need to do differently
- Feeling motivated and supported as they head into the next few months

**Here's how you can head into the mid-year conversation with confidence.**

## Before the conversation

A bit of preparation will help the conversation flow and show your team member how invested you are

You'll find guidance about viewing and updating the mid-year documents on MyHR Portal [here](#) or at the bottom of this guide.

- 1) Well before the meeting, ask your team member to reflect on their performance by adding their comments to MyHR Portal
- 2) Use MyHR Portal to remind yourself of your team member's goals and read the comments they've added
- 3) Reflect on the progress they've made against their goals as well as their performance more generally
- 4) Make notes and talking points of examples you can take into the meeting. Include activities where praise is due, and where constructive feedback is needed

Don't just focus on **what** your team member has achieved. Think about **how** they've achieved it and the behaviour they've displayed. You can reflect on this by using our [culture essentials behavioural expectations](#).

## During the conversation

As a manager, you will naturally lead the meeting but try not to dominate the conversation. Aim for about 50/50 in terms of who is talking and use open questions to encourage your team member to own their progress.

### Do this by...

- Ask for your team member's views first, before sharing your own observations
- Consider your team member's preferences (e.g. a reflector with a strong focus on feeling as well as thinking) and how you can shape your questions and style in line with this
- Always celebrate strengths and achievements. Mid-year is a great time to recognise and motivate your people
- Frame challenges positively by encouraging your team member to think about what they've learned
- Give them constructive tips to grow
- Be clear about what action they need to take to maintain momentum or improve their performance
- Make sure there are no surprises – you should be having regular 1:1s so there shouldn't be anything your team member doesn't already know

**Use the conversation guide on the next page to help you have a great conversation.**

## After the conversation

- 1) Add your comments to your team member's mid-year document on MyHR Portal
- 2) Ask your team member to update their performance and development goals on MyHR Portal, if any need updating
- 3) Continue to regularly check in and review progress in each 1:1.

# How to lead a great mid-year conversation

## How to structure your conversation

Use the suggested questions to help your conversation flow.

### 1 Set the scene

Remind your team member about the purpose of the conversation and invite them to share their thoughts on how things are going.

#### Ask

Looking back over the last quarter, what were your key achievements and successes?

What progress have you made against your performance and development goals?

### 2 Discuss their progress

Use some of these open questions to help you explore your team member's achievements, challenges and behaviours.

#### Ask

What accomplishments are you most proud of?

What challenges did you face and how did you overcome them?

What did you learn from these experiences?

In what projects, tasks or situations did you display our Culture Essentials? How did they help you?

Are there any projects, tasks or situations where you could have used the Culture Essentials more?

### 3 Share your observations

It's time for you to share your observations from your pre-prepared notes.

Keep a balance between positive feedback as well as areas for improvement.

Always be clear, constructive and factual when you're sharing your observations.

In cases where you need to see improvement, be clear about what you need your team member to do differently in future.

### 4 Look ahead

Now review your team member's performance and development goals. Use some of these questions to help you.

#### Ask

Looking forward to the next quarter, what will your key focus be?

Do we need to adjust any of your performance goals because of changing priorities?

How are you progressing with your development goals?

Is there anything getting in the way of you achieving your goals?

Is there anything we can better support you with from an inclusion perspective (e.g. in relation to a health condition or personal circumstance)?

Tell me one thing I could do that will help me better support you as your manager?

**Note:** Performance goals should focus on activities that help us achieve our business goals. [Click here](#) for more on goal setting.

### 5 Agree next steps

Agree actions your team member needs to take in order to maintain momentum or improve their performance.

Wrap up the conversation by agreeing when you'll review progress.

More information on Performance Improvement Plans (PIP) can be found [here](#)

## Supporting you

**We recognise that not every mid-year conversation will be straightforward. If this is you, then read these articles before you head into the conversation.**

Brush up on your feedback skills [here](#)

Heading into a challenging review? [Click here](#)

Address poor performance with these tips [here](#)

## Need further support?

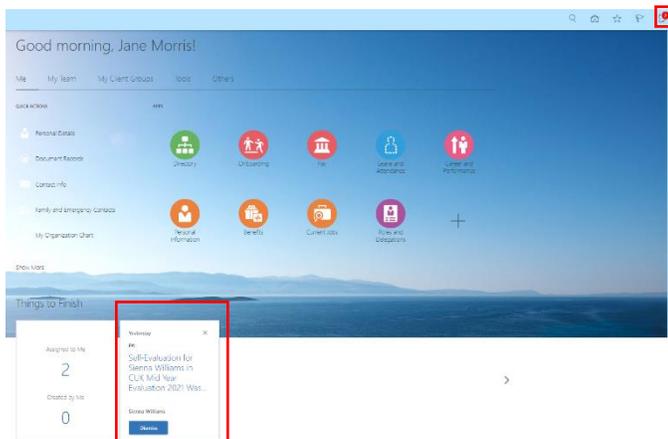
Get in touch with **People Support** or your **HR Business Partner** for advice.

## Manager – Mid Year Conversation

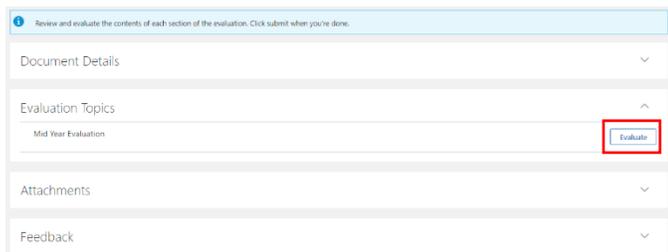
As a manager, you'll have access to review and edit the mid-year conversation document before and after your conversation with your direct report. The document is managed in **My Team > Performance Overview** and can be found underneath the year-end evaluation document. You also have the opportunity to print the document if you find this useful.

Guidance on how to complete the Mid-Year Document in myHR portal can be found below;

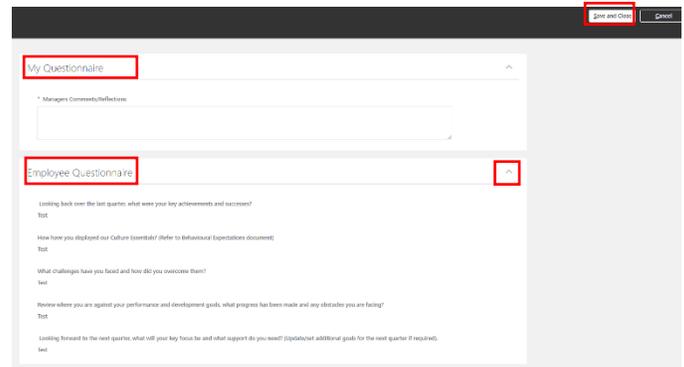
1. Once your team member has completed their comments and submitted the document, you'll receive a notification in myHR portal and via email.
2. The notifications can be found by hovering over the 'bell icon' or 'Things to Finish' at the bottom of the homepage.



3. By clicking on one of the notifications, you will be directed to the team member's performance document.
4. You can also access the team members document through **My Team > Performance Overview > Select the team member > Mid-Year Evaluation**.
5. You'll be taken through to the below page, click **Evaluate**.



6. You'll now see the manager comments box under **My Questionnaire**. Your team member's comments can be viewed in **Employee Questionnaire**. If you cannot see the questions and comments, **click the expand arrow** on the right hand side of **Employee Questionnaire**.
7. Once you have had the conversation and added your comments, click **Save**.



8. To submit the document back to your team member press **Submit**.



9. Your team member will receive a notification that you have submitted the document. The process is now **complete**.