Progress Tracking Tool Guidelines

An open dialogue is important, especially in times of change. To assist managers and employees with connection and performance and development conversations and to help manage stress during these turbulent times, we are offering the performance tracking tool. If you are already using a tool to track accomplishments and it is working well to document progress to plan, you may continue to use that tool.

Purpose

- Allow employees to document and communicate accomplishments weekly
- Provide a platform for dialogue to
  - Clarify goals and priorities
  - Seek guidance
  - Give and receive feedback
  - Recognize excellence
  - Build development plans

How to Use the Tool

1. Use the form to document accomplishments during the week.
2. Keep notes simple and descriptive. This should not be time consuming.
   A. **Goals Achieved/Accomplishments**: Briefly describe work activities and results including:
      - Progress against goals
      - Completion of regular job duties (email, phone calls)
      - Unexpected and special projects
      - Project and other work-related meetings
      - Team and administrative meetings
      - Individual development time (webinars, LinkedIn Learning)
   B. **Impact**: As applicable note impact such as business continuity or success metrics
   C. **Comments**: Use space for additional notes or if explanation or comment required
   D. **Signature**: Initials can be typed if no access to physical signature
3. Send to your manager at the end of each week and keep a copy
4. Schedule regular follow up conversations to discuss successes, challenges, and help maintain productivity and stress management

Suggested Next Steps

- Have a conversation with your manager to discuss the process (set up a file or tracking system that works for you such as Teams or Asana)
- Set up follow up calls/meetings
- Ask questions

"Coming together is a beginning, keeping together is a process, working together is success."

Henry Ford