

Keeping Track of it all

DOCUMENT, DOCUMENT, DOCUMENT

All Supervisors have heard it, but it does not have to be the bane of their existence. For example, all of these instances in which Supervisor Self discussed the upcoming Division Meeting with Randy create a record that there was on-going dialog about Randy's assignment for the Division meeting.

This simple documentation not only helps a supervisor keep track of interactions with Randy, but will lay a foundation for further action if necessary.

SCENARIO: Randy, a good employee is scheduled to make a presentation in an upcoming meeting that will be attended by all Division Staff. This is the first time Randy has been responsible for a portion of the agenda at a Division-wide meeting. Randy's Supervisor has been noting the times they have discussed the presentation by sending himself e-mails.

TO: Self

FROM: Self

DATE: August 3, 2012

Saw Randy in the hall and reminded him of his role in the upcoming meeting with Division staff. He said he was doing fine with the assignment and didn't need help.

TO: Self

FROM: Self

DATE: August 6, 2012

Discussed meeting presentation with Randy. He indicated he was almost finished with the product and didn't feel he needed a dry run on his presentationn.

TO: Self

FROM: Self

DATE: August 10, 2012

Spoke with Randy and answered his questions about the purpose of the division staff meeting

TO: Self

FROM: Self

DATE: August 11, 2012

Confirmed with Randy that he has everything he needs to participate effectively in the Division Meeting.

TO: Self
FROM: Self
DATE: August 12, 2012

Reminded Randy that I would meet him at 9:30 so we can go to Division Meeting together.

TO: Self
FROM: Self
DATE: August 13, 2012
Schedule meeting with Randy re:

Late arrival on date of Division Meeting
Incomplete and disorganized presentation
Poorly researched presentation.

Document performance in counseling memo.