Quarterly Calibration Overview



A Key to Employee Engagement

The basic structure of the Quarterly Calibration is designed to provide a different conversation than bosses and employees have on a day to day basis and help establish clear expectations around culture, values and performance to keep everyone on track. In a nutshell, the conversation should be scheduled in advance, usually at least a week ahead so there is time to prepare. This also let's your direct report know you are prioritizing your time with them to the point of calendaring it. Be sure to let them know this is not a formal review, but just a casual check-in conversation to talk about core values, their accountabilities, how they are doing and what concerns they have so that you can help them succeed.

The Quarterly Calibration should be off-site for leaders and managers, most often at a coffee shop, over breakfast or over lunch, and on or off-site at your discretion for front line employees (some businesses use the break room during non-break times for front line employees). This creates a more relaxed and open setting than being in your office or a conference room and will lead to more openness in the dialogue. Remember, you want your direct report to feel at ease and able to speak freely.

In advance of the meeting, complete the A-Player Assessment, just focusing on your direct report's last 90 days. Also give the employee a blank copy of the A-Player Performance Review document and ask them to do a self-assessment for the same 90-day period, using the 4-point scale on the A-Player Assessment. Evaluate them on each of your Core Values individually and then also on their Mission and their Obsessions from the Next Level Accountability Chart®. Also think about any areas where you feel they are performing well and any areas where you would like to see them focus on improving.

When you meet with the employee, start by checking in with them on family and personal life. Remember that part of the goal is to build a connection and relationship. Then move into Core Values. Take them one at a time and ask the employee how they evaluated themselves on the first Core Value. Use the phrase, "How consistently do you think your behaviors at work have aligned with this Core Value?" Listen to what they are saying and ask questions as necessary. Then share with them how you evaluated them. If you are on the same page, that's good. If you're not, have a conversation about the gaps to help them see why you are not aligned. For anything needs to improve, have a conversation about that. Then move to the next Core Value.

After you've been through the Core Values, move right to the Mission and Obsessions from the Next Level Accountability Chart®. Go through exactly the same process and when you ask them to rate themselves, ask them "How consistently do you think you've been doing great work in that area?" The point is to get on the same page with each other and make sure they are continuing to grow and improve.

A few other good questions to ask before you conclude are:

- Is there anything you need from me that you aren't getting? Resources, time, training, clear expectations, etc?
- Is there anything going on that is frustrating you or making it difficult to work here?
- Is there anything I'm doing that is making it difficult to work for me?
- Note: Also consider reviewing the Decision Matrix tool in this meeting as appropriate

Most employees never get the opportunity to have these kinds of conversations and they create fantastic engagement. If the process helps you identify that somebody needs to be put on a Coaching Plan, let this meeting be a segue into that process to either coach them up or coach them out. As always, if you have any questions or need any guidance, please reach out to your Next Level Growth Business Guide.

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Performance Calibration Form



NEXT LEVEL GROWTH®

Employee Name: **Date:**

	Core Value 1	Core Value 2	Core Value 3	Core Value 4	Core Value 5	Core Value 6	Core Value 7	Core Value Score	Mission/MCO®	Obsession 1	Obsession 2	Obsesssion 3	Obsession 4	Obsession 5	Obsession 6	Obsession 7	Performance Score
Score:																	

Strengths and Accomplishments:

Areas Needing Improvement:

Action Items for Improving:

Employee Comments:

Sample Scoring Definitions

4 **High Impact**: Consistently meets and often exceeds baseline expectations

3 **Meets Expectations**: Consistently meets baseline expectations

2 **Partially Meets Expectations**: Performance/Alignment is developing or inconsistent and needs improvement

1 **Below Expectations**: Performance/Alignment is often below expectations and employment is at risk

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A-Player Assessment



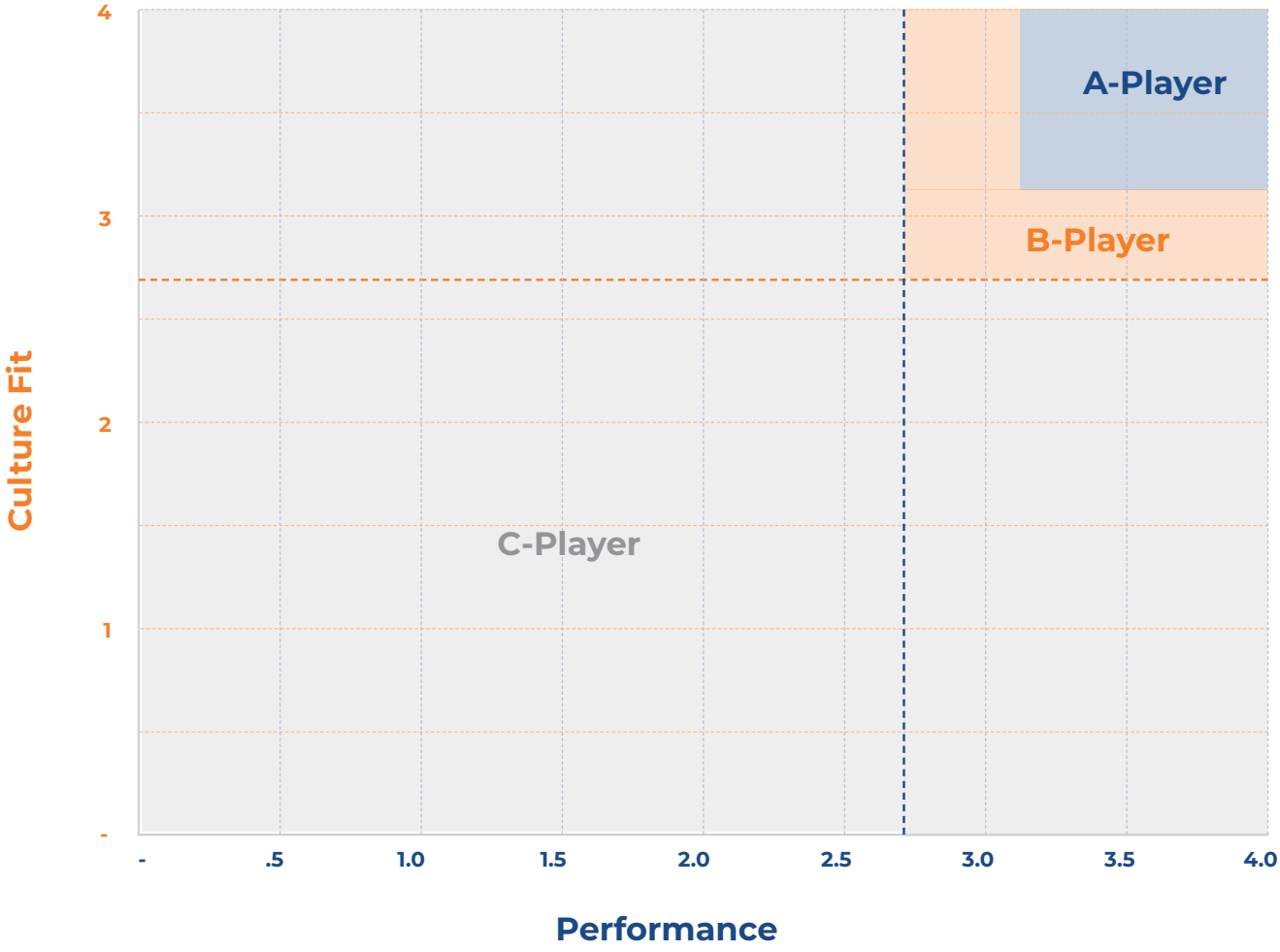
NEXT LEVEL GROWTH®

Team: ..... **Team Leader:** .....

Team Member Name								Core Value Score	Mission/MCO®	Obsession 1	Obsession 2	Obsession 3	Obsession 4	Obsession 5	Obsession 6	Obsession 7	Performance Score

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A-Player Assessment Tool (4-point scale)



4-point Scale with Definitions

4	**High Impact:** Consistently meets and often exceeds baseline expectations
3	**Meets Expectations:** Consistently meets baseline expectations
2	**Partially Meets Expectations:** Performance/Alignment is developing or inconsistent and needs improvement
1	**Below Expectations:** Performance/Alignment is often below expectations and employment is at risk

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ALL ABOUT
Next Level Growth

› QUESTION

What is Your **Next Level?**



Do you have a vision to multiply revenue, secure investment, exit your business, scale your social impact, or build a legacy? I'll help you articulate your vision and get there faster than you ever thought possible.

Together, we'll analyze your situation, plan your strategy, then kick off the journey with two or three days of Base Camp to work with your leadership team to implement a custom business operating system based on the Next Level Growth Approach. We'll follow this up with quarterly and annual strategic meetings to continue leveling up, until we reach your summit.

› INSIGHT

Every Organization Already Has an **Operating System.**

Yours is perfectly designed to get the results you're getting.

Most organizations operate on a system that has developed organically and often haphazardly over time. It's full of inefficiencies that result from unclear roles, responsibilities, and processes. It often lacks the galvanizing force that comes from a compelling vision, mission, and meaningful values. And almost always, it lacks the power of a winning strategy set up to create a truly elite organization.

What got you here, won't get you to the summit!

To reach your Next Level, and eventually the summit of your business mountain, you will need an operating system built on proven principles, custom-configured for your organization.

› CONCLUSION

It's Time for an Upgrade.

FIRST STEP

Take the Elite Organizations Assessment and in about 10 minutes, you'll get a customized report based on your answers that is filled with resources to help you get immediate value.

NextLevelGrowth.com/Assessment

"Inspiration is perishable...act on it quickly."

Naval Ravikant