

## Monthly Summary One-on-One Report

Employees: This report is to be completed in preparation for each one-on-one meeting with your manager as a way to track your development for the annual development meeting and to encourage a productive means of delivering feedback to and from your manager. Remember to keep your eye on the target and create opportunities for yourself to support the organization's strategic goals. You will need to save and re-use this form each month in order to update it. In the end you and your manager will only have one working form each year.

Click here to enter name.

Click here to enter a date.

**Talk Shop:** Use this time to update each other on current projects, activities, and departmental updates.

Click here to enter reminders for topics you would like to discuss.

### Key Responsibilities(Specific to Job)

**Accomplishments (Monthly):** Share (celebrate) what you have accomplished in your job and/or what you have been working on based on your previous one-on-one meetings.

Click here to enter text.

**Sticky Points (Monthly):** Share any areas in your job that caused difficulty and what you did to resolve and/or any support you need to resolve.

Click here to enter text.

**Special Projects (Monthly):** Share any projects outside of your normal day to day that you are working on...

Click here to enter text.

### Core Competencies

Please share how you supported our core competencies this month.

**Action Orientation**-We do things fast and we are committed to getting it right.

**Customer Engagement**-Exceptional service is our only option.

**Flexibility**-Responsiveness with expertise and composure.

**Interpersonal Effectiveness**-The quality of every interaction matters!

**Character**-We are defined by who we are and what we do.

**Results Focus**-We start with the end in mind.

**Collaboration**-We believe that diverse, committed people working together will change the world—or at least our industry!

Click here to enter text.

**MISSION: To simplify complexities for each customer**

# Goals

## Strategic Goals/Department Goals:

Manager: please insert department goals as they relate to the strategic goals at Healthesystems.

[Click here to enter text.](#)

## Employee Goals

Please identify 3-5 goals you would like to achieve. Here is what you should include;

- the anticipated impact to the organization/department's strategic goals
- the development vehicle, tool or method to accomplish your development goal (i.e. Healthlearning, research, reading, cross-department shadowing, etc.), support needed, and time it will take.
- the date of expected completion.

### Click here to enter goal and impact

[Click here to enter;](#) the vehicle, support/tools, and time needed to achieve the goal  
[Click here to enter a date.](#)

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SAMPLE