

The Performance Culture System™ Review Coaching Guide

“If you are stuck, relationally
or organizationally, it is
because
there is a conversation
you are not
having or
not having well.”

Joseph Grenny
Crucial Conversations

The purpose of this guide is to provide our recommended process for review coaching conversations and share coaching techniques to help you develop and lead your team.

Review Conversation Process

GOAL:

The goal of the review coaching conversation is to evaluate past performance, invest in the employee's development, review feedback provided and set future expectations to move the organization forward.

With this goal in mind, navigate to [Feedback > Performance > Team Reviews](#) to access the current review and follow the recommended process below.

Recommended Process for your Coaching Conversations

We recommend managers follow the process below when discussing the review results with employees:

1. Read the Performance Objective aloud.
2. Read employee's rating and rating definition (i.e. "You rated yourself 3 stars which is Satisfactory...").
3. Read employee's comments aloud.
4. Pause - allow the employee to process and give them space to provide additional thoughts.
5. Ask clarifying questions on their rating or comments if needed.
6. Read your rating and rating definition (if different than employee's rating).
7. Read your coaching notes and add any additional thoughts.
8. Pause - allow the employee to process your comments.
9. Ensure the employee understands and is aligned with your comments / suggestions.

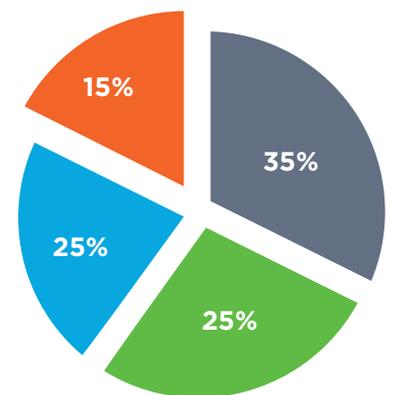
Repeat the process above for the Workplace Behaviors section. Be sure to read aloud both the Workplace Behavior Name and Description.

Workplace Satisfaction Rating & Custom Questions

Even your Star employees can become frustrated due to many changes that may occur during a review period. Workplace Satisfaction gives employees the structure and the space to not only "say" how they feel but provide ideas on how things could improve.

As managers, rather than guessing about your employees' workplace satisfaction or what makes them feel appreciated - review this section with each employee to gain insight. Learn how you may need to adapt your style or make organizational changes to improve employee engagement and satisfaction.

Recommend Reading: *The 5 Languages of Appreciation in the Workplace*
by Gary Chapman & Paul White



Workplace Satisfaction Summary

Personal Goals and Professional Development Objectives

It is important for employees to be as personally aligned in their jobs as possible. Be sure to discuss how they achieved their goals and what new goals they may want to focus on for the next review cycle.

Dos for Effective Coaching Conversations

There are many techniques to consider when facilitating a coaching conversation. Here are several Dos and Don'ts to ensure you are ready for the 1 on 1 Review Conversation.

Dos

- **Always begin from a genuine place of care.**

Your employees don't care about what you have to say, until they know you care about what they have to say.

- **Ask clarifying questions if needed.**

"Tell me more...?" is a great way to gain clarity.

- **Acknowledgments should be both verbal and written.**

Document acknowledgments in coaching notes so the employee can reference them in the future.

- **Be specific.**

Acknowledgments and/or constructive critiques should be specific. This is how you let the employee know what to continue doing and how to improve.

- **Be aware of body language.**

Reading the employee's body language and facial expressions help identify how they are receiving feedback.

- **Be okay with silence.**

You will be surprised how much more detail / feedback employees will provide if they are allowed the time and space.

- **Paraphrase using the employee's words.**

When possible, use the employee's own words in your question. (i.e. "What does "playing fair" look like?")

- **Frame your suggestions for consensus.**

When possible, collaborate with the employee on suggestions by re-framing them. Rather than, "I would like you to do ..." try "What do you think about also doing...?".

- **Assess the employee's comfort level.**

Make sure the employee is aligned with any new suggestions or requirements to achieve or exceed the desired outcome. Simply asking "How do you feel about that?" can help determine if the employee is on board and comfortable executing new ideas.

- **Pay attention to the words.**

Sometimes our words give us away. Ask for clarity when an employee's comments conflict with the goal or their ratings. (i.e. An employee's rating may be "Outstanding" but their comments reveal they did not meet the goal.)

- **Thank them for their feedback.**

Don'ts for Effective Coaching Conversations



- **Don't ask "Why" questions.**

These can come across as judgmental and make the employee feel defensive. Rather than asking "Why did you rate yourself 4 stars?" try "Can you tell me more about how you came to your 4 star rating?"

- **Don't get "into the weeds".**

Concentrate on the employee's development and schedule another time to talk about project details.

- **Don't rush the review process.**

Schedule enough time so you and the employee do not feel rushed. This time should be devoted to the employee's development and alignment with goals and not just another task to check off the list.

- **Don't allow distractions.**

Refrain from bringing phones to the meeting or allowing other distractions so you can be present in the conversation.

- **Don't use close ended questions.**

Refrain from questions that lead the employee into yes/no answers. Open ended questions that begin with "What" or "How" will allow for more feedback.

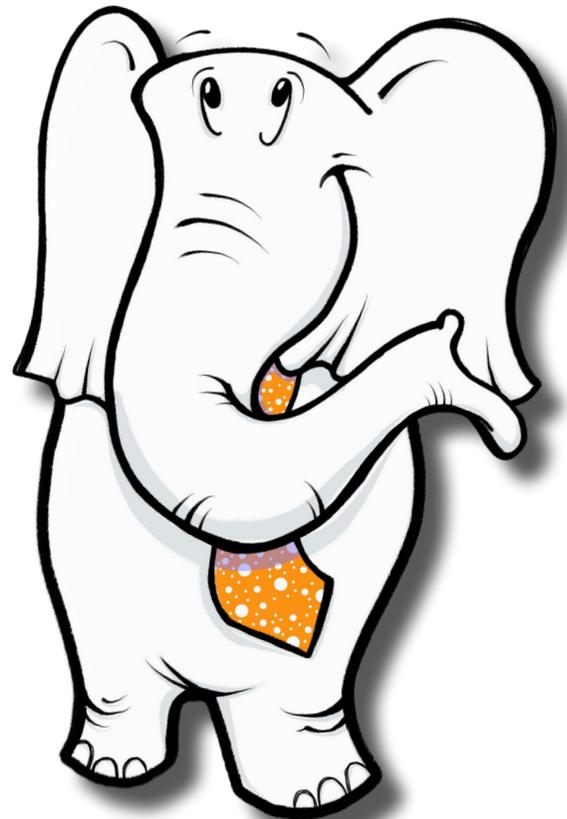
You don't have the memory of an elephant...

Document your coaching notes along the way to recall specifics and save time.

Don't fear the elephant!

Invite him in the room for a candid conversation.

Remember... What gets rewarded gets repeated.



PerformanceCulture.com
888-505-0650

Coaching Conversation Scenarios

It is ideal when, as managers and employees, your evaluations are aligned; however, this is not always the case. When your evaluation is less than the employee's evaluation your goal is to close the gap and realign expectations and performance. Review the coaching conversation scenarios below for tips on how to challenge employee's ratings and address misalignment.

Scenario I - Closing the Gap on Ratings



You rated yourself 4 stars which is "exceeding requirements". The objective was to obtain 20%. Can you tell me more about your rating?

I realize now since I achieved 20%, I should have rated myself 3 stars which is "meets expectations". If I had exceeded the objective % that would be 4 stars.



You are correct which is why I rated you 3 stars "meets expectations" for this objective. Great job focusing on the process and making it more efficient in order to achieve the goal.

"Success in a crucial conversation is not about how risky the topic is. It is about how safe others feel discussing it with you."

- Joseph Grenny

Scenario II - Collaborating on New Ideas



I really like how you approached Client Focus with periodic phone calls to our clients. I rated you 3 stars - "meets expectations". Can you think of other ways we can be proactive in touching our clients and helping them feel appreciated?

I think most of our clients would really appreciate a hand-written note, but I am not great with words when it comes to writing.



The written notes are a great idea and if you share what is in your heart the notes will feel personal and be great!

Coaching and Training Services

Want to learn more or need help? We offer additional services to help managers learn coaching techniques, how to apply them and to continue developing their people management and coaching skills. Contact your Performance Culture Coach if you are interested in any of the services below.

Coach the Coach Sessions

The first 1 on 1 review session can seem a bit overwhelming. Many find it helpful to engage the help of a Certified Performance Culture Coach.

The full day of 1 on 1 Coach the Coach sessions include your coach facilitating up to five 1 on 1 meetings and two manager debrief / coaching sessions. This serves to aid the manager in navigating the Performance Culture System and train them on how to conduct a successful coaching conversation.

During these sessions, your coach will give immediate feedback to managers on what they are doing well and where they can improve. Your coach will help managers with the process and the Dos and Don'ts for an effective conversation.

"Thanks for the review facilitation day. It really helped to ease our managers and employees into the new process." - Julie Wilsey, Airport Director at Wilmington International Airport

Manager Online Learning

We offer webinars developed specifically for managers and leaders of organizations. These webinars, conducted on-line by a live coach, are tailored to provide tools managers can incorporate into their people and performance management process.

Ask about our upcoming webinars. We can also customize manager webinars for your organization and industry. See Custom Trainings section below.

Custom Leadership and Development Trainings

Many organizations find it helpful to have a coach develop and deliver training specific to their issues, challenges and desired development objectives. We collaborate with leaders to create custom training to maximize your investment.

Executive Coaching

Senior leaders looking to improve their leadership skills find it helpful to work with an Executive Coach. If your organization is interested in investing in an Executive Coach, we will develop a customized Scope of Work to fit your needs.

Behavioral Profiles - DISC Assessments

We believe behavioral profiles (specifically DISC) provide valuable insight needed to foster effective team communication. We can provide DISC Assessments for your individual team members as well as a team analysis. Once these profiles are complete, they can be uploaded to your Performance Culture account to be shared with your entire organization.