

The Performance Culture System™ Review Conversation Guide

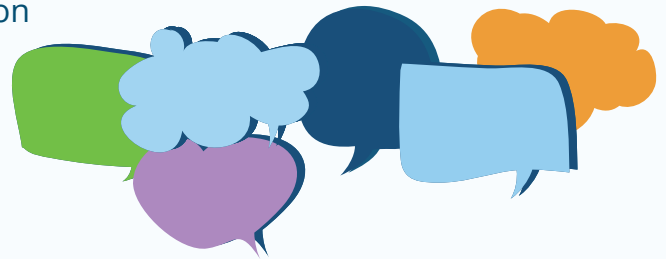
Better Teams achieve **Better Results**.

Conduct effective and meaningful review conversations that help employees deliver.

“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



Process

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.

Review Conversation

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 giving them space to provide additional thoughts.
5. Ask clarifying questions on their rating or comments if needed.
6. Read your coaching notes and add any additional thoughts.
7. Read your rating and rating definition (if different than employee's rating).
8. Pause - allow the employee to process your comments.
9. Ensure the employee understands and is aligned with your comments and coaching.

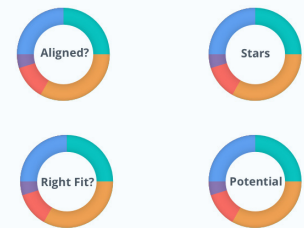
Repeat the process above for the Workplace Behaviors section. Be sure to read aloud both the Workplace Behavior Name and Description.

Workplace Satisfaction & Questions

Even your high performing 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.



● Very Pleased ● Pleased ● Content ● OK, but could be better ● Frustrated

Personal & Professional Goals

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.



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.



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.

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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.

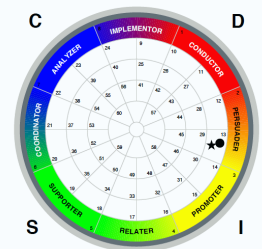
Don't use close ended questions.

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.

Communication

We all have our preferred way of communication. During the review conversation it is helpful to keep in mind how best to communicate with the employee.

Consider reviewing the employee's assessments, if available, as a reminder of their natural behavioral style and key workplace motivators.

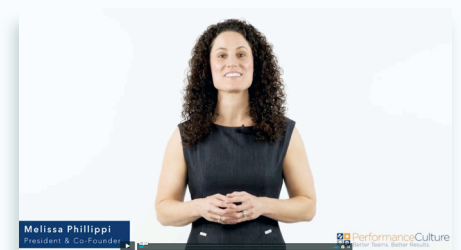


Sample DISC

Remember... What gets rewarded gets repeated.

Coaching Videos

For more coaching tips and review conversation recommendations, check out the Coaching Videos in your Learn Library.



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.

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!

Want to learn more or need help? We offer Coach the Coach Sessions for onsite, real-time coach training during your review process. Contact us for more details.