

CULTURE HACKER

REPROGRAMMING THE EMPLOYEE EXPERIENCE™

Coaching Conversation Guidelines



Coaching Conversation Guidelines

Introduction

The purpose of these guidelines is to provide you with ideas, processes, and insights on how to handle critical coaching conversations with an employee or manager who reports to you. These conversations are critical moments in an employee's experience and will significantly impact how they feel about what they do and for whom they do it. As a manager, your approach and facilitation of these conversations with your team members will determine your team's or department's culture.

Informal vs. Formal Feedback

Feedback is essential because it not only drives performance in a positive direction, but it also positively impacts the attitude and mindsets of all employees.

Informal feedback is found in the everyday, casual conversations regarding how work is being done. On the other hand, formal feedback is more organized, clearly documented, and saved in an employee's or business' files. Many organizations have issues with formal feedback because managers and leaders don't know how to deliver informal feedback effectively, which means many formal feedback mechanisms such as performance reviews, recognition rewards, and disciplinary action lack credibility and substance.

To support the formal feedback mechanisms, you must deliver a series of informal feedback and performance conversations consistently, fairly, and in a timely manner. This document outlines the sequence of those conversations, guidelines on how to deliver each conversation effectively, and some reminders on when you should document or record them.

Informal Feedback Guidelines

Objective: The purpose of informal feedback is for the employee to gauge their performance via a conversation with you, their manager. This daily, casual conversation should highlight any opportunities for improvement or recognize a job well done. As this conversation is informal, it does not need to be documented.

Format: Informal feedback needs to occur daily, but only requires a couple-minute long conversation and can be conducted in the operation.

Ensure your feedback includes the following key characteristics:

- **Fair and balanced:** Consider the circumstances in which the behavior occurred. Not all behavior is the team member's fault. Consider whether they have been set up for success. Balanced means that not all the feedback you give is negative or for improvement. In fact, you should provide more positive feedback and recognition than critiques of their performance.
- **Timely:** Informal feedback should occur right after the behavior was observed (or, ideally, within an hour).
- **Personal:** Use the person's name when delivering feedback.
- **Specific:** Provide details of what was observed or heard.
- **Void of any negative emotions in your delivery:** Informal feedback should be a quick, casual conversation that does not stand out in anyone else's mind, other than the person who receives it, so any emotions must be kept to a minimum.
- **Question-based rather than statement-based:** Ensure the person understands the impact of their behavior by asking them questions. By asking questions, the person receiving the feedback has to process information rather than just being a passive listener.
- **Genuinely thankful:** Always thank a team member after giving them feedback.

The Informal Feedback Model

1

Give the reason for the feedback

- “John, do you recall that we've been focusing on our value, Strong Work Ethic?”

2

Describe the behaviour observed

- “I noticed you didn't promptly respond to a guest's request. Do you remember when this guest requested something from you?” (Wait for their answer.)

3

Ask, “What was the impact?”

- “When we don't respond promptly to our guests and their needs, how does that impact their experience?” (Wait for their answer.)

4

Ask, “What can you do to deliver a better experience?”

- “Next time, what can you do to make sure you respond to guests promptly, upholding our Strong Work Ethic value?” (Wait for their answer.)

5

Say, “Thank you.”

- “John, thank you for your commitment to serving our guests. Let me know if you ever need support or assistance. I'm here to help.”

“When we make progress and get better at something, it is inherently motivating. In order for people to make progress, they have to get feedback and information on how they're doing.”

—Daniel Pink, author

Weekly Performance Conversation Guidelines

Objective: The focus of this conversation is to recap performance over the past week and discuss opportunities for improvement, express recognition, or identify development opportunities. This conversation should reinforce any informal feedback you gave to the employee. This conversation is informal, meaning it does not need to be documented.

Format: This should be a one-on-one conversation between five to ten minutes. Ideally, this conversation should occur weekly, but every two weeks is sufficient. Performance is defined by what is delivered against how it is delivered. Job requirements, skills, the aptitude necessary, and any goals established serve as the basis for what an employee delivers. The company values define how an employee should perform in their role. When having a performance conversation, consider both aspects of performance: what they deliver and how they deliver it.

Feedback must be fair, balanced, timely, specific, and based on questions, not statements. With this mind, please consider the following in your conversation:

- **Fair:** Consider the circumstances in which the behavior occurred. Not all behavior is the team member's fault. Consider whether they have been set up for success.
- **Balanced:** Balanced means that not all the feedback you give is negative or for improvement. In fact, you should be providing more positive feedback and recognition than critiquing performance. Remember the 4:1 rule, which means our brain remembers negative feedback four times more than positive feedback; therefore, we need to ensure we are providing at least the same (but preferably more) positive reinforcement during your performance conversation.
- **Timely:** The feedback you provide in a performance conversation should be focused on the past one or two weeks, depending on the frequency of your conversations.
- **Specific:** We must be specific and provide details or examples of any behavior you are recognizing or critiquing.
- **Ask Questions:** Remember to ask questions rather than make statements or assumptions about why someone is acting the way they are. By asking questions, the person receiving the feedback has to process information rather than just being a passive listener.
- **Look Ahead:** Discuss any opportunities coming up in the next week or two that will require the employee's attention, help, or focused improvement.
- **Grateful:** Always thank a team member at the end of each conversation.

"I absolutely believe that people, unless they get feedback, never reach their maximum abilities."

—Bob Nardelli, former CEO of Home Depot

Annual/Semiannual Performance Conversations

Objective: The focus of this conversation is to talk about planning for the future. We call these conversations, 'Achievement Planning' conversations. The purpose of these conversations is as much for the manager as it is the employee, because every manager should understand how they are able to help an employee achieve something meaningful rather than just helping them improve.

Format: This should be a one-on-one conversation that lasts around 60-minutes. It is important that the manager and employee are both prepared to discuss performance moving forward as opposed to just what has occurred. If you are consistently having your regular performance conversations, then this annual event can become more meaningful. With this mind, please consider the following in your conversation:

- Try to conduct the conversation away from the office and in a comfortable setting
- Ensure the employee comes prepared to discuss what they want to achieve in the next six to twelve months, based on how they think they have performed in the past few months
- Ensure the employee has three written goals for the next twelve months
- Ask the employee what they are doing to further their own development
- Ask the employee what they need from you to further their development
- Ask the employee what they need from the organization to further their development

“When feedback is focused on an employee’s development, it makes it a lot more helpful. Feedback becomes a gift of someone investing in the recipient’s time.”

—Mark D. Cannon, professor of leadership and organizational studies,
Vanderbilt University

Tough Conversation Guidelines

Objective: The purpose of this conversation is to reinforce formally and directly an employee's or manager's performance issues or challenges. This conversation is formal; the manager will note the time, date, reason for the conversation, and any agreed-upon improvement steps in their calendar, so they have a record of it.

Format: This should be a one-on-one conversation. This conversation should be conducted in a setting that is private and away from others. Tough conversations specifically address areas of poor performance—either what the employee is delivering or how they are delivering it. These issues must have already been discussed during previous performance conversations. This tough conversation is a more serious and formal version of the performance conversation. When delivering a tough conversation, keep these ideas in mind:

- **Recognize Strengths:** Begin this conversation recognizing the person's strengths, talent, and the value they bring to the organization. This recognition aims to help release any tension and highlight that this person is an important member of the team.
- **Explain Why:** Clarify that the purpose of the conversation is to ensure that the company can deliver its mission, vision, and promise to customers, employees, and leadership. As such, the organization has identified the tasks, values, and standards necessary to accomplish this. You can then highlight what area of performance needs to be discussed and why it is important: either what they delivered or how they delivered it.
- **Be Specific:** Be prepared with facts and examples of when the performance issue occurred and how it impacted the customer, employees, co-workers, or the business.
- **Ask Questions:** Remember to ask questions rather than make statements or assumptions about why someone is acting the way they are. By asking questions, the person receiving the feedback has to process information rather than just being a passive listener. You need to understand why the person has had trouble meeting expectations.
- **Develop a Plan:** Determine what steps need to be taken to rectify the performance. Agree on how to move forward, what support is needed in terms of training, information, tools, or conversations. Discuss any opportunities coming up in the next week or two that will require the employee's/manager's attention, help, or improvement. Indicate that you will check in with the person in the next two weeks as part of the performance conversation to talk about how things are going.
- **Be Grateful:** Always thank the person at the end of each conversation and reinforce your commitment to their success.
- **Document:** Ensure you document the time, date, reason, and plan moving forward in your calendar. This documentation will provide a reference if disciplinary action is required in the future. Add in a calendar event for two weeks to check back in with the employee/manager.