



# The 5 Step Guide To Conducting an Effective Chat

## 1. Ask for the employee's perspective on their month.

By listening first, rather than speaking and by asking probing questions, it's amazing how often assumptions about people's underlying beliefs and actions are proven wrong. As trust builds, people will often share more relevant information that fast-tracks solutions.

*"Susan, how did you feel last month went?"*

You can show you are listening here by saying uh-huh etc but do not interrupt at any stage, even if you completely disagree with what they are saying. Let them talk their way through until they finish.

## 2. Give the organisation's perspective.

Give staff feedback on the points they've raised from the business perspective, using objective examples.

Use specific and constructive feedback.

Compare:

*"I am very disappointed with your efforts lately. I think you know what I mean."*

*vs "You said you were pleased with your performance this month. I was disappointed to see that you were late four days out of five this week. What was the reason for that?"*

This is also a great environment to share the big picture with employees. If people understand the reasons behind seemingly arbitrary decisions, or learn that their particular bugbear hasn't been acted on because it isn't shared by the majority, they are more content with organisational outcomes.

*'I know that computer system is time-consuming at the moment because of all the double entries you have to do. The IT guys are researching a new whole-of-company system at the moment so we just have to hang in with this old system for another few months.*

This is also where you may wish to raise something that the employee hasn't raised. Note, pick only the most important points to discuss. Don't shower them with hundreds.

### **3. Explain the impact (good or bad) and express appreciation for good performance or analyse poor performance.**

Discuss the impact this is having on the business, the team, the employee, the customer and relate this impact to your vision, goals and standards.

#### **Good performance:**

*“Well done! You said you were going to improve last month and your monthly sales of \$20,000 are exceptionally high compared to the average of \$13,000. It’s wonderful to see what you have achieved and you have raised the bar on what everyone now believes they can do as well.”*

#### **Poor Performance:**

*“If the banking is not done daily, then we will lose income on interest, which will directly affect the financial goal in this office we set at the start of the year. And we won’t achieve our team vision of being the most successful team ever. What do you think is the main obstruction for you getting this in on time?”*

OR

*“You said in your appraisal last month that you were going to improve your sales figures. They’ve now dropped \$1000 compared to last month which means we may not achieve our team’s financial goal. What do you think is the reason for this?”*

Back up your observations with proof (note examples throughout the month for reference); do not offer opinions, psychoanalyse them, or be judgmental.

### **4. Discuss consequences and explore ideas for solution (for employees with below standard performance).**

- Brainstorm with employee.
- Empower them to find the solution using coaching and hypothetical questions.
- If the solution they come up with is poor, ask questions to demonstrate this.

*“What do you think will happen if you continue to come in late several times each week?”*

Or *“If you were the manager of this business what would you do if someone was late several times each week?”*

*“I would be very disappointed if it actually came to this – what sorts of things could you change to make sure this doesn’t happen?”*

*“Let’s pretend you are going to be the number one salesperson this year - what would you have to do to make this happen?”*

If employee then says, *“I would have to keep my desk tidier”* you would then ask a question:

*“If you kept your desk tidier all year, would that be enough to make you the top salesperson?”*

The whole point of coaching is that if the employee comes up with the solution themselves they are much more committed to it, than if it is suggested by you.

## **5. Write down an action plan and get commitment:**

Employees now write down a future goal with target date for achievement.

- How can they improve what they are currently doing?
- How can they use their skills further?
- What do they wish to achieve?

Get them to write down their set goal for the next month, file these in a one-on-one folder and use this for follow-up. Set follow-up dates based on the severity of the behaviour eg very poor behaviour might require follow-up a week later.

For employees that have been demonstrating repeated negative behaviour or that you suspect are simply telling you what you want to hear, ask:

*“On a scale of 1-10 with one being the least committed and 10 being the most committed how would you rate your commitment to this action plan?”*

Once the person realizes that you are committed to them changing their behaviour, and that there is no room for complacency they will be forced to change (knowing that you will repeat this exercise next month, quoting their stated commitment level) or they will leave.

## **Performance Appraisal – 5 step checklist:**

- 1. Ask for the employee’s perspective on their month.**
- 2. Give the organisation’s perspective.**
- 3. Explain the impact (good or bad) and express appreciation for good performance or analyse poor performance.**
- 4. Discuss consequences and explore ideas for solution (for employees with below standard performance).**
- 5. Write down an action plan and get commitment.**

And finally follow-up regularly such as comment on improved behaviour throughout the month, diarise to check daily for action changes, and write down examples to use in the next month’s one-on-one as soon as you see them.