

## Manager and Supervisor's Guide to Performance Discussion and Feedback

*Use the Performance Discussion Template to take notes and prepare for your discussion.*

**Before You Meet:** Consider where you will be meeting, as the location sets the atmosphere for the discussion.

- The best locations for difficult conversations are both neutral and private. A conference room or vacant office is better than your own office.
- Make sure there are no other people around and that you will not be interrupted.
- And lastly, consider your seating arrangement. Sitting behind a desk denotes power and can intimidate your employee, whereas sitting at a conference table or, even better, sitting side by side would open the discussion further.

### **Opening the Discussion: Reiterate Coaching Roles and Expectations**

For the discussion to be successful, both you and the employee need to remember your roles in the coaching relationship.

- Remind your employee that they have agreed to be open to discussing their performance and listen constructively. Also, remind them that you would like them to share their point of view and ideas for moving forward.
- Remember that it is your responsibility to:
  - Set the right tone to start the discussion
  - Provide accurate, constructive feedback
  - Facilitate joint problem solving and brainstorming
  - Ensure the proposed solutions will solve the problems and achieve goals
  - Co-create a next step action plan

*See the Coaching Communication Techniques section for strategies for effective listening, techniques for dealing with difficult conversations, and more.*

### **5 Steps to a Performance Discussion:**

- 1) Discuss how well the employee is using newly learned skills or behaviors.
- 2) Provide feedback on how the employee is performing against his/her performance goals and brainstorm reasons for gaps in performance (from both of your perspectives)
- 3) If the employee's performance is causing a problem, determine if the employee is aware of the problem and its impact
- 4) Joint problem solve by brainstorming possible solutions
- 5) Formulate an agreed upon joint action plan

Next, you will find more detailed tips for facilitating a discussion on the 5 steps above.

**Step 1: Tips for providing feedback on use of newly learned skills or behaviors.**

- Before meeting, ask the employee to prepare a summary of their experiences using new skills or implementing changes.
- Ask the employee to share their experiences and also share your own observations of where they have made improvements and had success.
- Ask the employee if there are any areas they feel they could use additional support to continue progressing in these successful areas?
- Share your own insights for continued progress.

**Step 2: Tips for providing feedback on the employee's performance compared to goals and expectations.**

- Before meeting, ask the employee to prepare a short self-evaluation of how they think they are performing against established goals and expectations.
- Discuss the employee's evaluation and share your view on their performance.
- For areas that need improvement, ask the employee what they think they need in order to improve, such as additional training, information, or support.
- Share your own insights and determine needed action steps.

**Steps 3 through 5: Tips for providing feedback on performance problems and solutions.**

- Address specific problem areas and ask the employee if they are aware of the problem and its negative impact. If they are not aware, clearly explain why it is a problem and the consequences.
- Ask the employee what they think is causing the problem.
- Share your perspective of what acceptable performance in that area would be.
- Conduct joint brainstorming to identify possible solutions.
- Brainstorm new goals, outcomes, expectations, and measurements.
- Confirm what additional needs the employee has in order to develop the skills and knowledge in order to meet the new expectations.
- Agree to next steps, commitments, and a follow-up plan in order to move forward toward the next level of performance improvement.

**Closing the Discussion**

Once you've provided constructive feedback, brainstormed solutions, and created a plan going forward, you need to close the discussion with clarity and an empowering tone.

- Summarize important goals and action steps.
- Reiterate commitments your employee has made.
- Remind the employee that you are going to continue to support and follow-up on their progress.
- Express your confidence that the action plan will help the employee reach their goals.
- Ask the employee if they have any questions.
- Thank the employee for their commitment to working together.