

PERFORMANCE DISCUSSION PLANNER

Describe the problem factually in a professional manner.

You want to be professional and non-threatening. You should be able to describe the problem in one or two simple sentences. Do not offer any solutions. Just ask the questions and wait for an answer.

Indicate why it concerns you.

This is important as it explains "why" you are having this discussion. You should be able to do this in one simple sentence.

Ask the employee for their help in solving the problem. Then say, can you tell me what happened or why it happened?

Asking the employee for help is as simple as: "I need your help" then say, "can you tell me what happened?" At this point be quiet. Wait for the employee to answer the question.

You job is to now listen. You can ask clarifying questions only. After each time the employee says why it happened, paraphrase what that said and ask "are there any other reasons?" Continue this process and probe to the "no, there are no other reasons."

It is at this phase you are using your diagnostic skills as a manager to understand why this is actually happening.

Now summarize all reasons given and ask again are there any other reasons? Only when the employee says "no there are no other reasons" are you finished with this step.

You may be tempted to offer solutions. Don't, that is the employee's job.

Now say, I understand why this happened, what are your ideas to make sure this doesn't happen again.

Again, this starts with a simple open-ended question. Don't try to ask a complex question or one that presupposed the answer to the question

(Phrase the question to bring in the behavior, for example: What are your ideas to make sure the report is not late again?) After each idea jot it down and paraphrase it followed with do you have any more ideas? Again, you will probe to the "no, I don't have any other suggestions"

Avoid the trap when the employee says "I don't know. What do you think I should do?" Unless the employee is new and really doesn't know, you can say you're are closest to the job, I would like to hear your ideas.

When the employee has no more ideas, summarize all the ideas and ask are there any more ideas? Again, Probe to the "no, I have no more ideas."

Sometimes the ideas are clear other times you have to ask questions to clarify when the action will begin,

One question I ask at this point, what can you do to make sure I am kept informed of a situation where the situation comes up before it becomes a problem?

Summarize the agreement. Compliment the employee on the good work and that you feel if s/he follows the plan this problem will be a thing of the past.

There are two ways to document the plan. 1) Ask the employee to write up the agreement and give it you by a date certain, e.g., tomorrow morning. Only when you review the written document can you see how committed the employee is. 2) You may have write the agreement and work with HR to make sure the agreement is solid and is a good foundation for future action.