

Performance Conversation Preparation Worksheet – SAMPLE ONLY

Meeting with: Employee Name

Scheduled Meeting Date: _____/_____/_____

Problem: Write a brief description of the problem you plan to address.

Why it is disruptive: List specific reasons why the issue is disruptive to the team, department, people who are served by the department, etc.

Expectations were set: Provide reminders of expectations that have been set; if expectations were not set in the past, take an opportunity to do it now. Make sure expectations are SMART (specific, measurable, attainable, relevant and timely).

My balanced approach to the conversation: Bullet some main points:
1) State why the issue is a concern
2) Give specific examples
3) Communicate expectations clearly and check for understanding
4) Give an opportunity for employee to articulate both concerns and plans to tackle the issue
5) Reinforce value to the department (build esteem)
6) Offer support; offer to remove barriers to success
6) Offer thanks for participating in a tough conversation; show confidence that it will improve; promise feedback and follow up; make sure to also catch her “doing things right”

Contingency plan: If meeting does not go well, take a time out to regroup (call HR if needed); revisit after a cool down period. If personal issue comes into the discussion focus on what is in the span of control at work (build esteem); lean on HR to help secure support for personal issues