

Facilitator's Guide



Engaging in Conversations to Optimize Employee Performance

Manager's Program



employee performance solutions

because your employees are your business



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Topic: Licensing and Facilitation

Workshop Facilitation and Materials

Program Materials and all aspects of the Conversations to Optimize Employee Performance Training Program are the confidential information of Employee Performance Solutions LLC (The Licensor).

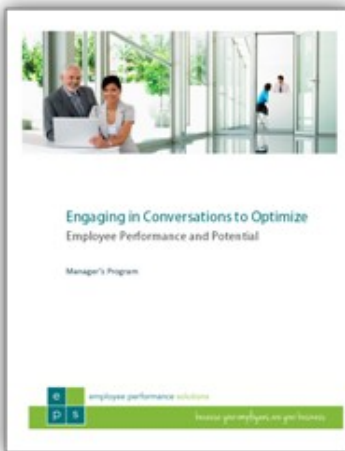
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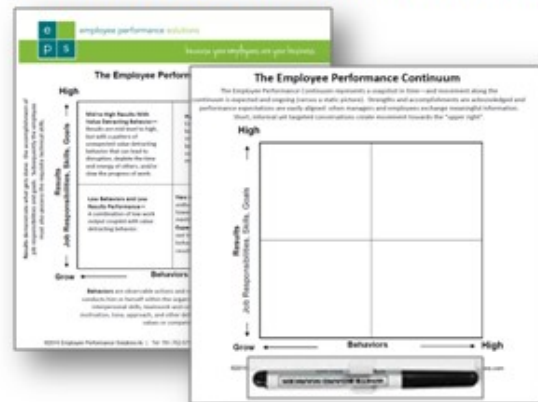
The material may be taught within the Client Organization only. Should the Certified Facilitator leave the Client Organization and wish to facilitate the program elsewhere, a new agreement must be initiated with the new Client Organization.

Each training participant will need their own set of materials:

Participant Workbook

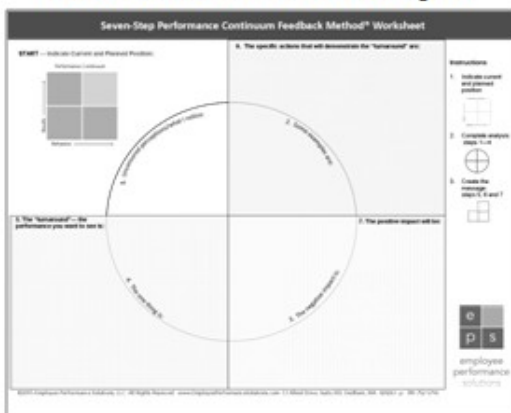


6"x7" Employee Performance Continuum Dry Erase Card With Marker



Worksheet Pad

Performance Continuum Feedback Planning Tool



Key Concepts Card



Conversations to Optimize Employee Performance

A Coaching Approach to Managing Performance

In this workshop, managers will learn how to use the [Performance Continuum Feedback Method®](#) to:

- Accurately assess performance to identify key development areas *and* highlight contributions and positive impact.
- Learn how to translate performance gaps into future-focused requests to bypass defensive reactions and create a quicker path to improved performance.
- Use a realistic role-play to practice your conversation.

The tools and skills learned in the class can be activated instantly with the Ten-Minute Conversation framework, a quick and insightful opportunity to check-in with and support employees.

You'll learn how to:

1. **Map employee performance effectiveness**—Use the Employee Performance Continuum model to identify the six employee performance types and learn how to leverage the model to differentiate performance and strategically plan performance conversations.
2. **Uncover the key areas for improvement**—Apply an algorithmic method to deconstruct performance concerns in order to hone in on the most critical opportunities for greater effectiveness.
3. **Know what to say**—Understand why the human brain is hard-wired to push away “constructive criticism”. Use the Turnaround approach to reframe off-target performance into "brain friendly" wording designed to describe future expectations.
4. **Address unexpected behaviors**—Identify behaviors that cut into productivity and slow the work of others. Learn an approach to comfortably talk about behavior based issues.
5. **Give positive, specific, meaningful feedback**—Learn three easy steps for crafting high-impact, meaningful messages that will make your employees feel truly appreciated.
6. **Use a framework for ongoing conversations**—Use the 10-Minute Questions Conversation to align performance expectations and create two-way dialogue with your staff.

Audience: People Managers

Topic: Program Materials

Workshop Materials

Facilitator Notes

Workshop Preparation

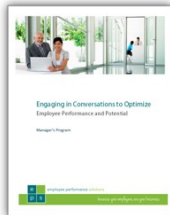


- Flip Chart or White Board and Markers

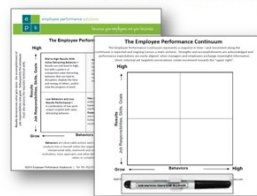


- Sticky Notes

Participant Workbook

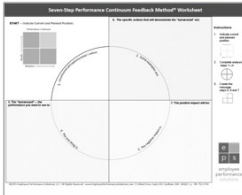


6"x7" Employee Performance Continuum Dry Erase Card With Marker



Worksheet Pad

Performance Continuum Feedback Planning Tool



Key Concepts Card



- Participant Materials
 - One set of materials per person

Topic: Tips for Using the Facilitator Guide

Workshop Materials

Facilitator Notes

A Note to Facilitators

The workshop is designed to be experiential. It balances teaching/explaining with individual, pair, and small group activities. The sequence of lecture and activities is designed to teach and explain an idea and immediately provide the opportunity for practice. It is suggested that you incorporate your own stories and personal examples to illustrate the concepts.

Facilitator Queues:



Teach/Explain



Participant Discussion



Workbook Activity



Post-It Note Exercise



Activity Requiring Flipchart



Approximate Activity Time



Video








Workshop Introduction and Overview

Topic: Facilitator Notes

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Learning Objectives

Learning Objectives	
	Use the Performance Continuum to gain a snapshot of the employee's current performance in terms of Results and Behaviors. The intent is to use this tool to help people grow and move forward.
	Give better quality feedback with concrete examples and the positive impact.
	Analyze current performance to determine what the employee can do to make even more progress. The focus is on moving forward versus reviewing past performance.
	Translate performance gaps, large and small, into language describing the "on-target" performance.
	Practice the Conversation using the 10-Minute Questions Conversation Framework



Teach/Explain

Review the Learning Objectives

Reveal the learning objectives on the animated slide.

The overall learning objectives are as follows:

1. Map Employee Performance Effectiveness. Use the Employee Performance Continuum model to identify the six employee performance types. Utilize the Continuum as the starting point to differentiate performance and strategically plan performance conversations.
2. Give better quality positive feedback
3. Analyze current performance to determine what the employee can do to make even more progress. The focus is on moving forward versus reviewing past performance.
4. Translate performance gaps, large and small, into language describing "On-Target" performance. Understand why the human brain is hard-wired to push away "constructive criticism" and select brain-friendly wording designed to be direct *and* reduce defensive reactions. Use the Turn-around framework to reframe negative information into a future-focused request versus a criticism.
5. Establish a *regular approach to ongoing performance conversations. You'll use this framework to practice the conversation you have developed.

*For organizations using an annual performance process, mention that this program will help write and deliver performance documents.

Topic: 10-Minute Questions Conversation Introduction and Video Demonstration

Slides, Worksheet, and Video

Facilitator Notes

Slide: 10-Minute Conversation Questions

Use this worksheet to take prepare for your conversation and take notes. Start with the 10-Minute Questions below, then take about any follow-up items from your last and today's meeting. Check in on your progress and any other work topics (tasks, projects, etc.). To these basic questions for the first three conversations then vary the questions by substituting others.

Manager Asks:
1. What's one thing you want to highlight from this month that you accomplished (or one thing that has gone well)?
2. What's one thing you want to get better at (team about, be involved in or a new skill you'd like to acquire)?
or
And/or another question you have:

Employee Asks:
1. What's one thing I'm doing well that I should continue?
2. What's the one thing I could do to make even more progress in my role (or what's the next thing for me to focus on)?
or
And/or another question you have:

Manager Asks:
1. What's one thing I'm doing to support you that's working well?
2. What's one way I could work better with you (or what's one thing I could do to support you more)?
or
And/or another question you have:

your notes

your notes

your notes

your progress from the last check-in

Here's what I did... 3/24/16

plan for following up on items from this meeting

I will

Date: _____

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Teach/Explain

The 10-Minute Conversation Questions

Use the animated slide to walk participants through the three sets of questions that are asked during the 10-Minute Conversation.

Worksheet Pad

Use this worksheet to take prepare for your conversation and take notes. Start with the 10-Minute Questions below, then take about any follow-up items from your last and today's meeting. Check in on your progress and any other work topics (tasks, projects, etc.). To these basic questions for the first three conversations then vary the questions by substituting others.

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or
And/or another question you have:

your notes

your notes

your notes

your progress from the last check-in

plan for following up on items from this meeting

Date: _____

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Explain that the worksheet is used to:

1. Prepare your notes for the conversation.
2. Guide and keep the conversation on track.
3. Take notes during the conversation.
4. Refer to at a later date.

Video: 10-Minute Questions Demonstration

Your Organization's 10-Minute Questions Conversation Video Demonstration



Video

Ask participants to follow along with the 10-Minute Questions Worksheet while watching the video.

Debrief Question Ideas:

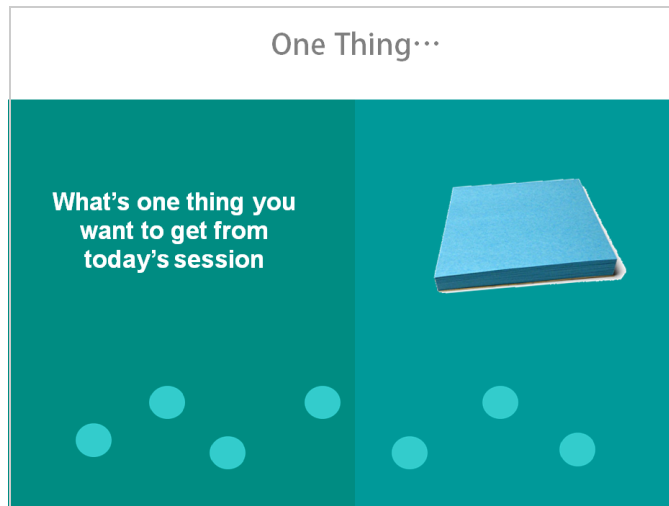
1. What was different about the 10-Minute Questions and a typical performance review? (focus on what is working now and what can be done moving ahead, two-way conversation, etc.)
2. What was different from your own experience?

Topic: Participant Expectations

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Participant Expectations



Workshop Expectations—One Thing

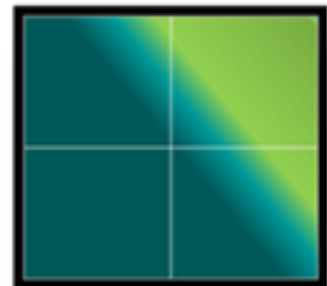
Ask participants to think about the one thing they'd like to learn from the session.

Provide participants with sticky notes to record their answers. Ask participants to post their notes around the room and then read all of the posted notes.

1

Employee Performance Continuum

Visually understand
performance and potential



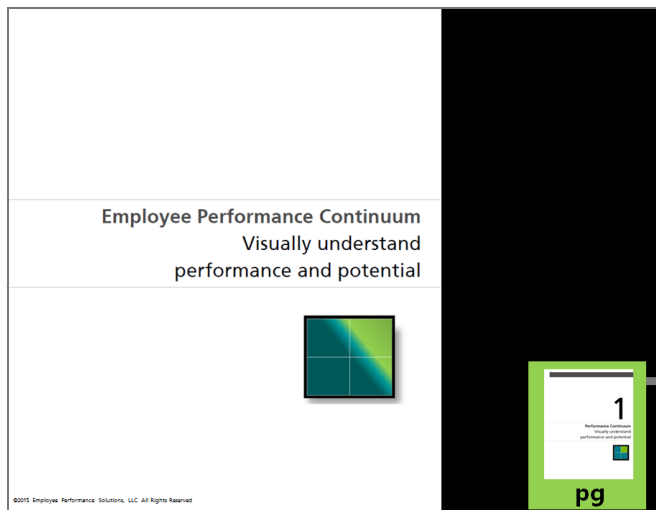
Topic: Facilitator Notes

Topic: The Employee Performance Continuum—Defining Performance

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Employee Performance Continuum



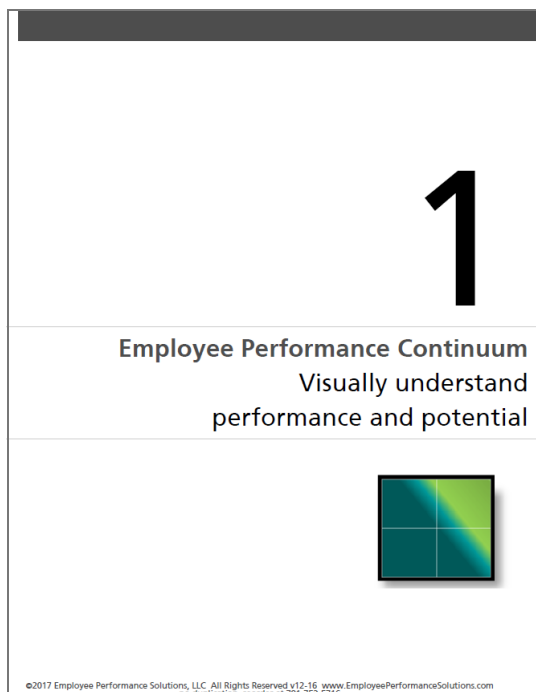
Teach/Explain

Introduce This Section

Performance is a combination of job responsibilities, skills, goals and behaviors. We will use a visual model to “see” the two components of employee performance:

1. Work Results
and
2. Observable Behaviors

Workbook Page: 5

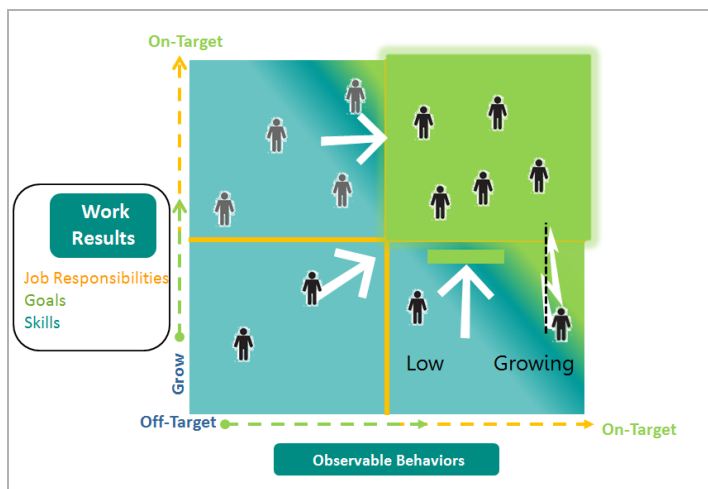


Topic: About The Employee Performance Continuum—Animated Slide

Slides and Participant Workbook Pages

Facilitator Notes

Slide



Note to Facilitator About This Slide

This animated slide is designed to explain the Performance Continuum and employee performance levels. This image shows the slide *after* the animation is fully revealed.

Stop Here: Review pages 12-15 for a full explanation of the Performance Continuum for:

- The Two Axis:**
 - Work Results: Responsibilities, Skills, and Goals
 - Observable Behaviors
- The Four Quadrants** (with an explanation of how to differentiate between performance levels):
 - Upper Right**
High-Accountable Performance; On-Target Work Results and Behaviors
 - Lower Right**
New and Developing; Making Expected Progress
 - or**
 - Lower Right**
Expected On-Target Behavior / Off-Target Work Results
 - Upper Left**
On-Target Work Results/Off-Target, Value Detracting and Unexpected Behavior
 - Lower Left**
Off-Target Work Results/Off-Target, Value Detracting and Unexpected Behavior

Workbook Page: 6

Conversations to Optimize Employee Performance and Potential—Manager's Program

Employee Performance Continuum Overview

About the Performance Continuum

If we were to draw a picture of performance effectiveness, it would look like this 4-square model we refer to as the Employee Performance Continuum.

Performance is a combination of results and behaviors.

Results describe *what* gets done and Behaviors describe *how* the work gets done. The Performance Continuum is based on the belief that what gets accomplished is as important as how it is accomplished.

Employee Performance Continuum

Work Results

On-Target

Off-Target

Observable Behaviors

Grow

Low

Growing

Work Results represent the ability to accomplish responsibilities and goals.

Behaviors represent how a person conducts himself or herself.

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Slides and Participant Workbook Pages

Facilitator Notes

Slide: Performance Continuum Explanation

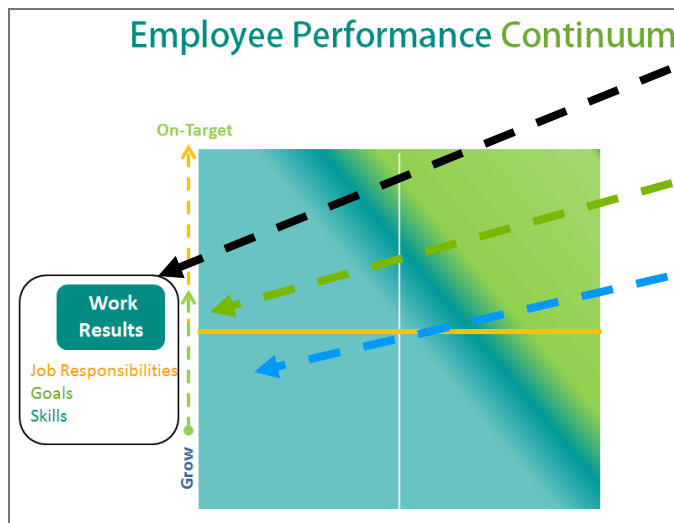


Teach/Explain

Performance Continuum

If we were to draw a picture of performance, it would look like this four square model, the Performance Continuum.

Slide Animation: Work Results



Work Results

Results are “what” gets accomplished. This includes job responsibilities, goals and the requisite skill set to meet goals and responsibilities.

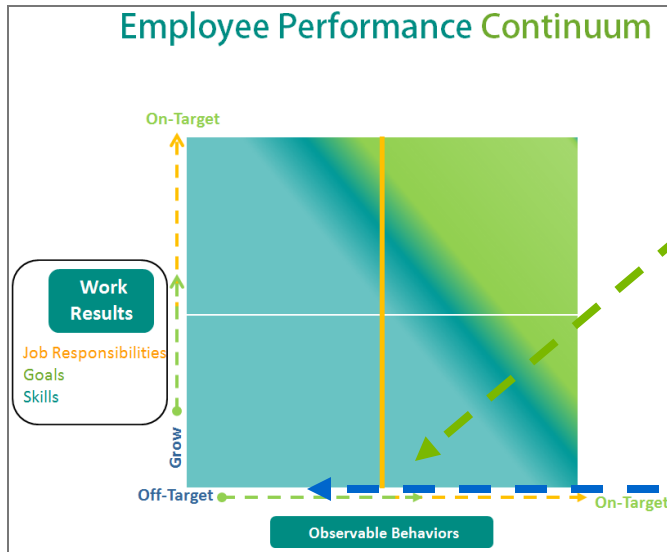
Above the Mid-Level Line Represents the Achievement of “On-Target” Work Results

- Seen as a contributor who “gets things done”.
- Consistent delivery of job responsibilities and goals.

Below the Mid-Level Line Represents:

- A) **New to Role and Growing:** the individual is making expected progress; will continue tracking towards “On-Target” Work Results with more time and support in the role.
- or
- B) **Off-Target:** despite having sufficient time and support in the role, this individual is not making progress (*facilitator note: the reasons for this will be explored later in the program*).

Slide Animation: Observable Behaviors



Observable Behaviors

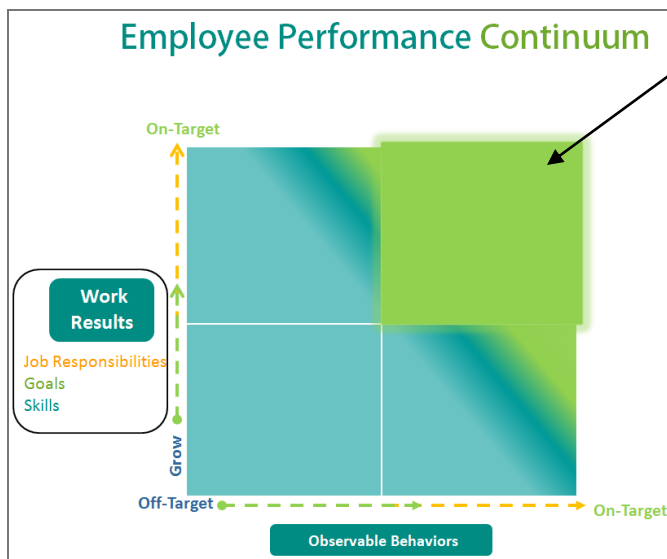
Behavior refers to how an individual conducts him or herself; Observable Behaviors are actions that can be observed.

"Right of Center" Represent On-Target Behaviors: Consistently exhibits expected, desirable behaviors aligned with organizational values:

- Is known for being approachable and supportive of others
- Is self-motivated and works with little direction
- Collaborates effectively at all levels
- Has a tangible impact and positive influence on others

"Left of Center" Represents Off-Target Behaviors: Demonstrates observable and unexpected behavior that detracts from overall value:

- The behavior can lead to disruption, deplete the time and energy of others, undermine team effectiveness, and slow the progress of work



The Objective

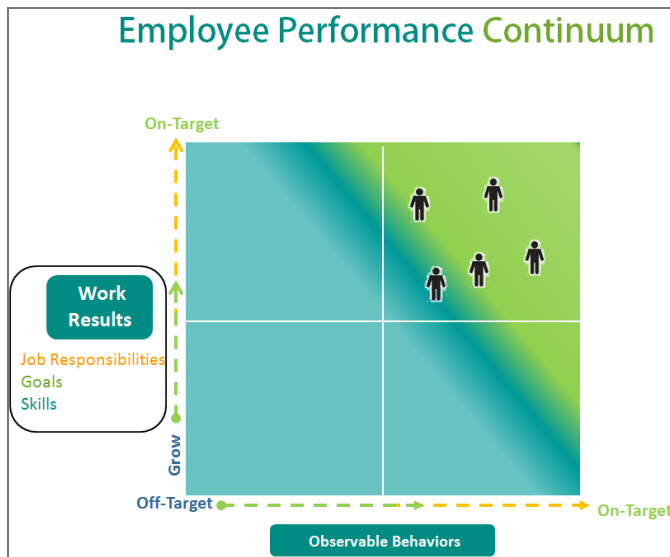
The goal is to manage performance towards the "upper-right": On-Target Behaviors and Work Results.

Topic: The Employee Performance Continuum—Upper Right and Lower Right

Slides and Participant Workbook Pages

Facilitator Notes

Slide Animation: Upper Right Quadrant

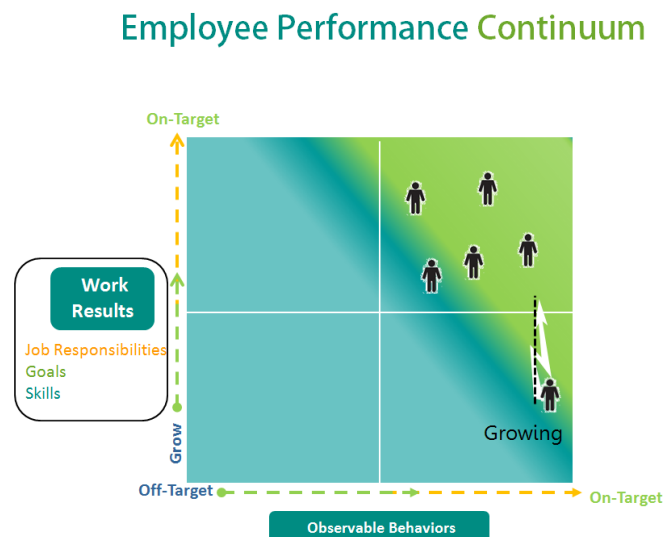


Upper Right

High-Accountable Performance

Employees functioning at this level are meeting the high expectations: On-Target Work Results and On-Target Behaviors.

Slide Animation: Lower Right Quadrant



Lower Right

New-to-Role and Growing

Employees functioning at this level are new to the role, enthusiastic, eager to learn and making steady progress towards gaining new skills, fulfilling job responsibilities and meeting goals.

Ask:

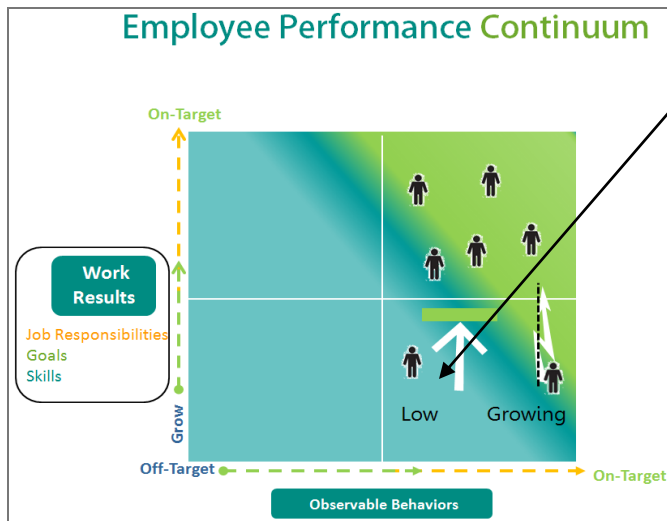
What are the characteristics of someone in the growth mode? What do they need to be successful?

Topic: The Employee Performance Continuum—Lower Right (Low Work Results)

Slides and Participant Workbook Pages

Facilitator Notes

Slide Animation: Lower Right Quadrant



Lower Right

Combination of: On-Target Behavior / Off-Target Work Results

Employees functioning at this level mean well and have expected behaviors, but despite making an earnest effort, Work Results are **Off-Target**:

- Has met some, but not all goals and job responsibilities
- Has received the appropriate support and time in the role, but less than expected progress has been made
- Needs a greater amount of support and supervision from the manager than should be expected
- Some of this individual's job responsibilities may get redistributed to more able-colleagues

Ask:

"Is it possible that the proper training and support wasn't provided?"

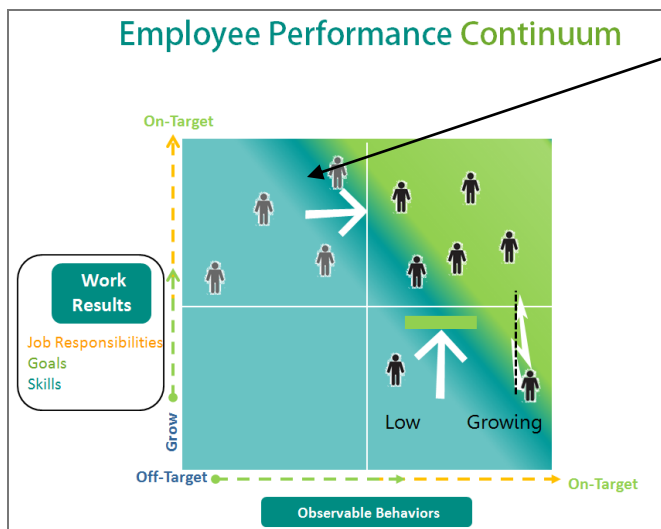
- Answer: Yes

Ask:

"What would the following indicate—The proper training, support, and time has been provided, yet progress is lacking?"

- Answer: It is likely that this role is not well suited for the individual.

Slide Animation: Upper Left Quadrant



Upper Left

Combination of: **On-Target Work Results / Off-Target Behavior**

On-Target Work Results

Employees functioning at this performance level are known for getting the work done. This individual may even be seen as a top contributor.

Any of the comments previously stated about On-Target Work Results apply:

- Seen as a contributor who “gets things done”
- On-Target and consistent delivery of job responsibilities and goals

Off-Target Behaviors

Perceptions about what constitutes value detracting behaviors are highly variable. What can be said is that the individual’s overall value and performance effectiveness is diminished by their behavior (observable actions).

The comments previously stated about Off-Target Behaviors apply:

- Demonstrates observable and unexpected behavior that detracts from overall value
- The behavior can lead to disruption, deplete the time and energy of others, undermine team effectiveness, and slow the progress of work

Inconsistent and Unpredictable

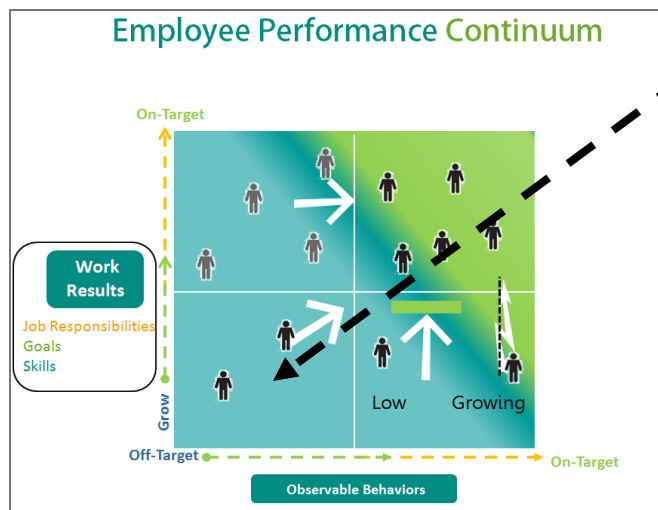
Individuals performing at this level may have good and bad days—they may have a reputation for being unpredictable or for treating people differently according to the circumstances or the individuals involved.

Topic: The Employee Performance Continuum—Lower Left

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Performance Continuum Explanation



Lower Left

Combination of: Off-Target Work Results and Off-Target Behavior

Performance in the "lower left" indicates that Work Results and Behaviors are both **Off-Target**

We want to "help the person out" (move to the upper right) or "help them out" of the organization" to open the position to someone who *will* be performing the job in the "top right."

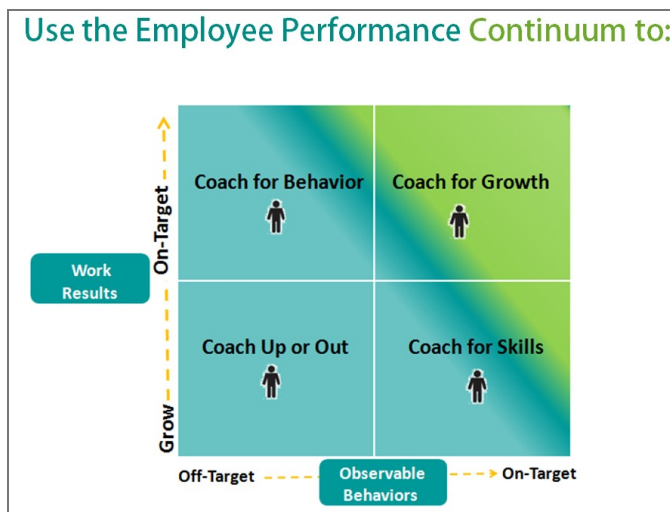
Topic: The Employee Performance Continuum—Coach and Grow Mindset

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Coach and Grow Mindset

Use the Employee Performance Continuum to:



Teach/Explain

The purpose of the Continuum is to assess current performance and planned performance. Think in terms of “what has to happen in order for this employee to grow and move forward”.

Emphasize that the purpose of plotting the employee’s current “coordinates” is to help identify specifically what *will* help the individual to become even more effective.

Card

Using the Employee Performance Continuum

Work Results: On-Target, Grow
Observable Behaviors: Off-Target, On-Target

Coach for Behavior, Coach for Growth, Coach Up or Out, Coach for Skills

Performance Continuum Feedback Method

Find the Gap Steps

1. Uncensored Perception(s)
2. Supporting Examples
3. Identify the Business Impact
4. Analyze for the “One Thing”

Craft the Message Steps

5. Turnaround
6. Describe the Specifics
7. Describe Importance

Quick-Method

1. Describe what you want to have happen
2. Describe the specific actions
3. Say why it is important

Performance Inhibitors
explanations for off-target performance

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Positive Insight

3 Steps

1. Uncensored Perception
2. Example
3. Positive Impact

employee performance solutions
because your employees are your business

Slide: Program Purpose

Program Purpose

Work Results: On-Target, Grow
Observable Behaviors: Off-Target, On-Target

Coach for Behavior, Coach for Growth, Coach Up or Out, Coach for Skills

All of the concepts and tools in this program are designed to drive employee performance towards the “upper-right” corner of the Employee Performance Continuum



Teach/Explain

All of the concepts and tools in this program are designed to drive employee performance towards the “upper-right” corner of the Employee Performance Continuum.

Topic: The Employee Performance Continuum—Plotting Exercise

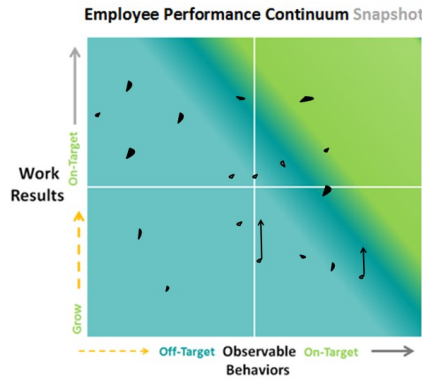
Slides and Participant Workbook Pages

Facilitator Notes

Slide: Performance Continuum Exercise

Where I see others:

Applying your experience to the Continuum



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Instructions

- Plot as many people as you can think of: past and present



5-Minutes



pg



Instructions for Activity 2-Part Exercise

Part 1:

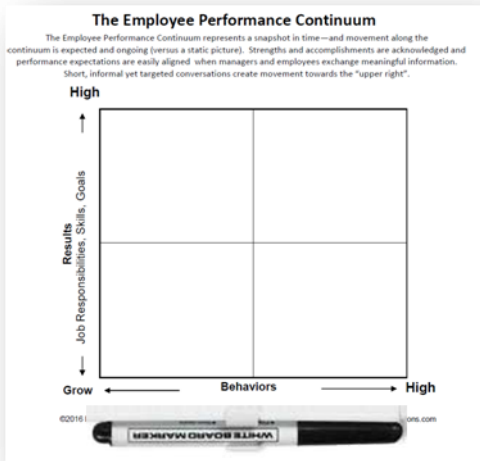
Review the instructions on the slide. Ask participants to think of as many people as they can and plot them on the Four Square Model in their Workbook.

Emphasize this: Include people you've worked with in the past and present (not just your current staff).



Approximate Activity Time
5-Minutes

Dry Erase Card



See next page for Part 2 of activity

Topic: The Employee Performance Continuum—Share the Plotting Activity

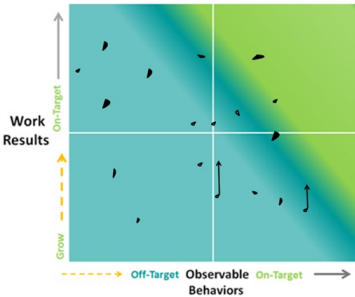
Slides and Participant Workbook Pages

Facilitator Notes

Slide: Explain Your Thinking Exercise

Connect with another workshop participant and **explain your thinking...**

Employee Performance Continuum Snapshot



Work Results: On-Target, Grow

Behaviors: Off-Target, Observable, On-Target

Instructions

- Pair up with another participant and take turns explaining your thinking behind your plotting (choose 2 -3 plots per person to explain)

10-Minutes

pg

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Instructions for Activity 2-Part Exercise

Part 2:

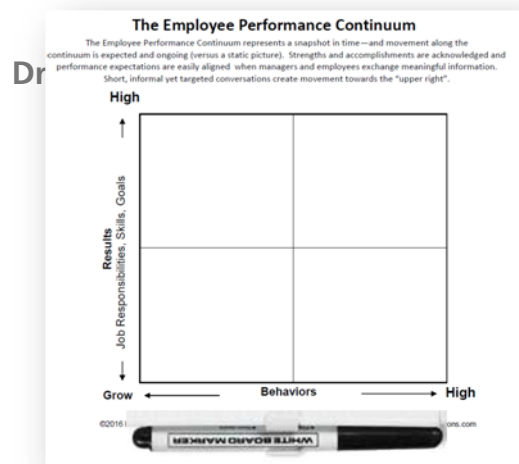
Ask participants to pair up with another individual to explain their thinking behind where they plotted 2-3 people on the Continuum. Each person talks about several of the coordinates (but not by name) on the Continuum and explains their plotting rationale.



Approximate Activity Time
10-Minutes

Debrief:

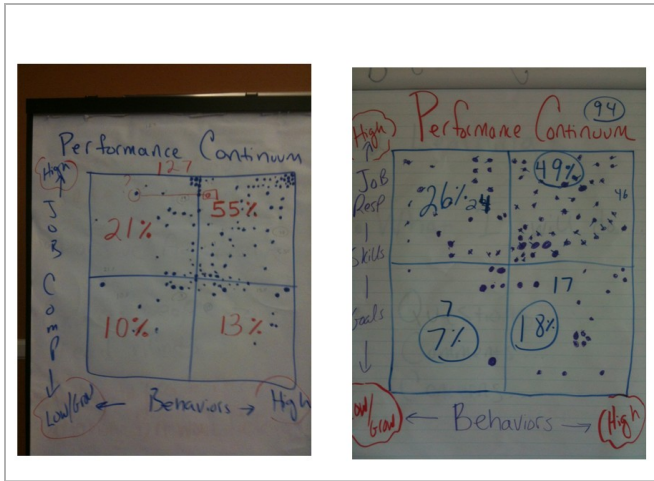
Check in with each partner pair and ask:
Ask, "What's something you learned from this?" or "What's something that came up during your conversation?"



Slides and Participant Workbook Pages

Facilitator Notes

Slides: Example Performance Continuums



Teach/Explain

Share these examples of Performance Continuums and make the following points:

1. Performance is varied (versus fitting into the traditional five category scenario: Outstanding, Exceeds, Meets, Below Expectations, etc.).
2. Performance management, done correctly, helps move more people to the “upper right”.
3. Moving people along the Continuum can be accomplished through purposeful conversations designed to target “what’s next” for each individual.
4. Ask, “What percent of people should we expect to have in the upper right hand corner”?

2

Deconstructing Employee Performance

A process to identify performance
strengths and potential gaps



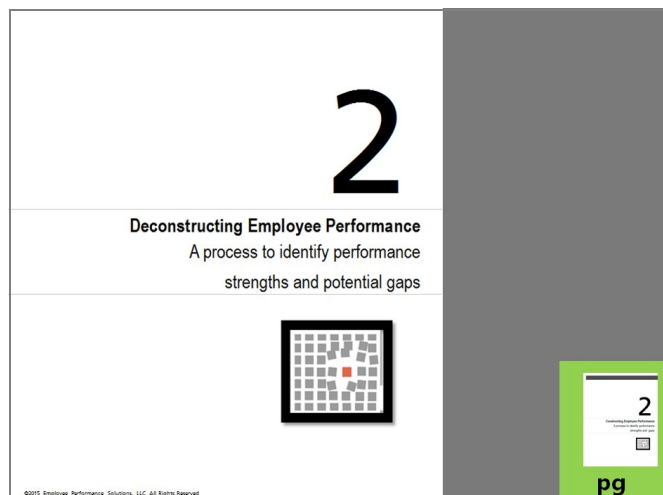
Topic: Facilitator Notes

Topic: Deconstructing Employee Performance—Uncensored Perceptions

Slides and Participant Workbook Pages

Facilitator Notes

Slide : Deconstructing Employee Performance



Teach/Explain

Introduce This Section:

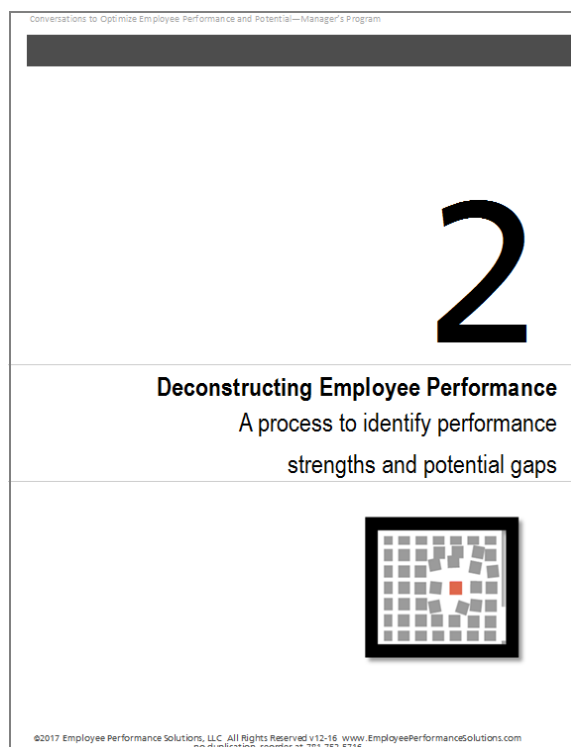
The Performance Continuum is just the first step in understanding employee performance.

The next step is to specifically identify:

1. Performance Strengths
2. Performance Gaps

Workbook Page: 6

Workbook Page: 8



Slides and Participant Workbook Pages

Facilitator Notes

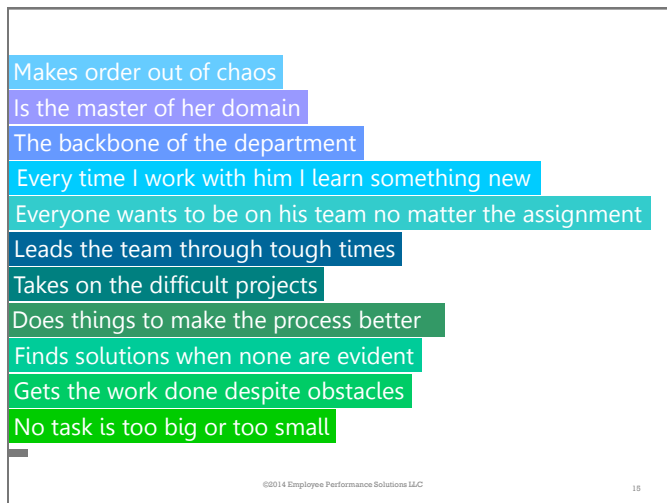
Slide : Positive Uncensored Perceptions



Teach/Explain

Introduce This Section:

After plotting an employee, the next step is naming your “uncensored perceptions”. Uncensored perceptions are unchecked assumptions and opinions. These thoughts can be positive and negative, and can occur to you when thinking about your interactions with an individual.



Perceptions can be positive.

Reveal the list of positive uncensored perceptions.

Slides and Participant Workbook Pages

Facilitator Notes

Slide : Negative Uncensored Perceptions



Teach/Explain

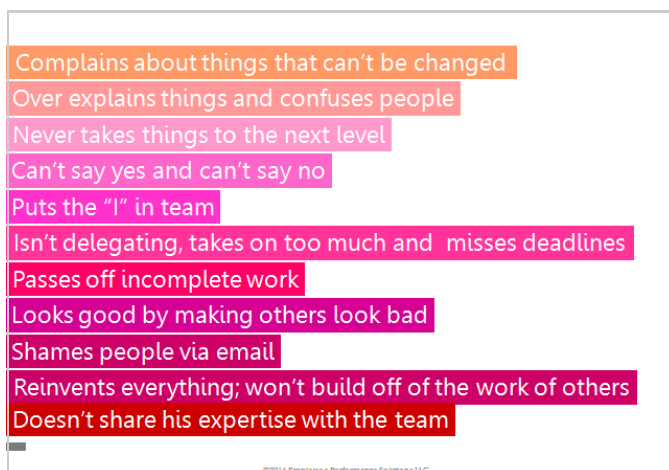
Introduce This Section:

We also have negative uncensored perceptions. You'll see that this is just one step in the process but that it's really about getting in touch with the highest impact area for coaching and feedback.

If we can identify a performance gap then we are one step closer to determining what *can* be done to close the gap.

The goal is to clearly identify the area for focus. Ultimately we want to articulate what *will* help the employee become even more effective.

Slide : Negative Uncensored Perceptions



Reveal the list of negative uncensored perceptions.

Topic: Your Uncensored Perceptions Activity

Slides and Participant Workbook Pages

Slide : Your Uncensored Perceptions Exercise

Your Uncensored Perceptions

Uncensored Perceptions	
Negative	Positive

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pg



Instructions for Activity 2-Part Exercise

Part 1:

Write down your perceptions. For this exercise, think of as many people as possible, current staff, others you work with and have worked with in the past.



Approximate Activity Time
5 Minutes

Workbook Page: 9

Uncensored Perceptions

Negative	Positive

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3

Sharing Positive Insight

Three steps to craft positive, high-impact insightful messages



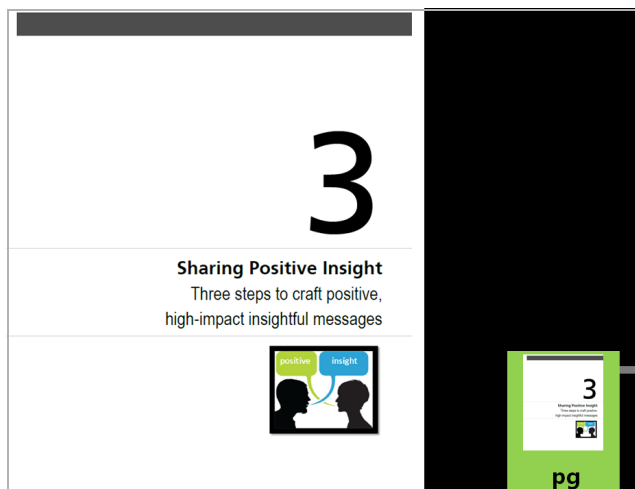
Topic: Facilitator Notes

Topic: Sharing Positive Insight

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Sharing Positive Insight

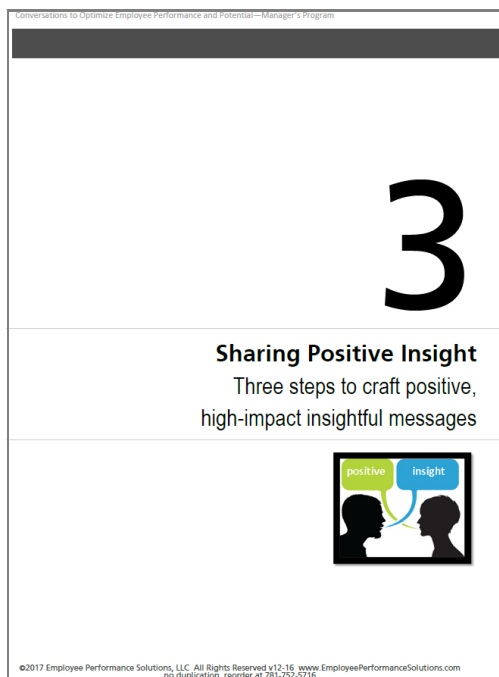


Teach/Explain

Introduce This Section

There are three steps to create positive, high-impact Insightful messages for others.

Workbook Page: 10



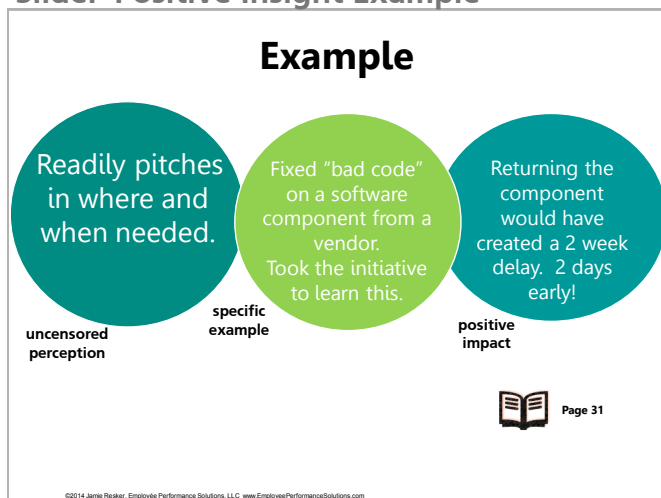
Topic: Sharing Positive Insight

Slides and Participant Workbook Pages

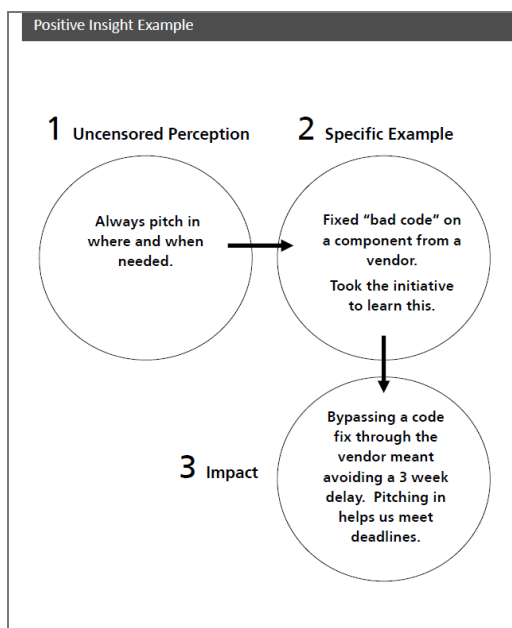
Slides: 3 Steps for Positive Insight



Slide: Positive Insight Example



Workbook Page: 11



Facilitator Notes



Teach/Explain

Review the slide example and explain:

When giving positive feedback we want to include three things:

- Slide 1:** Reveal the three sets of animation on the 3 Steps for Positive Insight slide
- Slide 2:** Reveal the animated Example slide

Ask:

"What do you think is the most useful information to the individual on the receiving end of this information":

- The perception
- Provide a specific example
- Describe the positive impact
- Answer: Most will say it's the *impact* that matters most.

Topic: Sharing Positive Insight—Pairs Activity

Slides and Participant Workbook Pages

Facilitator Notes


Slides: 3 Steps for Positive Insight and Example

Steps


1. Find a partner to work with.
2. Think of an employee who reports to you
3. Switch workbooks (you're going to write your partner's example in his/her book and your partner will write your example)
4. Interview your partner by asking the three sets of on the Positive Insight Worksheet:
 - 1.) What is a positive perception you have about the individual you have in mind (example: Great team player)?
 - 2.) Describe a specific example.
 - 3.) What is the impact? Why does this matter?
5. Switch roles
6. Return your partner's workbook to him or her

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Positive Feedback Pairs Exercise



6-Minutes Total



Pg



Instructions for Activity

*Refer to the instructions on the slide:

1. Find a partner to work with.
2. Think of an employee who reports to you
3. Switch workbooks (you're going to write your partner's example in his/her book and your partner will write your example in your workbook).
4. Interview your partner by asking these three sets of on the Positive Insight Worksheet:
 - What is a positive perception you have about the individual you have in mind (example: Great team player).
 - Describe a specific example.
 - What is the impact? Why does this matter?
5. Switch roles
6. Return your partner's workbook to him or her.



Approximate Activity Time
6-Minutes

*Facilitator Tips

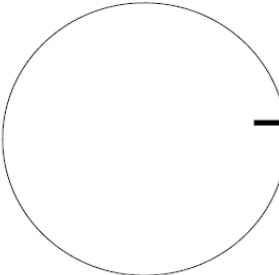
The multi-step instructions for this activity can be confusing. Here are some common points of confusion:

1. Some participants believe the exercise is to provide positive feedback about the person they are paired with—their partner. It's not. It's about someone else—their partner is simply recording the answers.
2. Scan the room for participants who are "not writing/not doing the exercise". They are likely confused (and time is passing—this is a 6-Minute exercise). Check-in with anyone who appears "lost" to insure the exercise is understood and is underway.


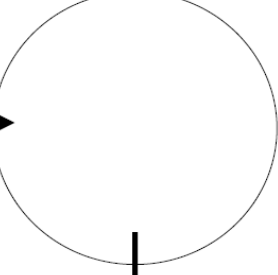
Workbook Page: 12

Positive Insight Worksheet

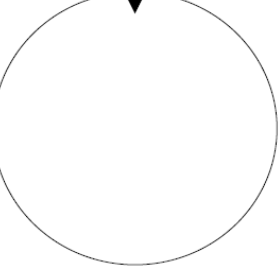
1 General Perception




2 Provide a Specific Example



3 Describe the Positive Impact





Topic: Sharing Positive Insight—Sharing Examples

Slides: 3 Steps for Positive Insight and Example



Instructions for Activity

After the pairs have completed their Positive Insight activity:

1. Remind participants to return their partners workbook (each person now has his/her workbook).
2. Instruct participants to share their example with someone else in the room. If the person they wrote the positive example for is in the room, then invite them to find that person to share their positive feedback (this works well with intact groups).

Workbook Page: 12

A worksheet titled "Positive Insight Worksheet" with a dark header. The content is organized into three numbered steps, each with a circular space for writing. Step 1 is "1 General Perception", Step 2 is "2 Provide a Specific Example", and Step 3 is "3 Describe the Positive Impact". Arrows indicate a flow from Step 1 to Step 2, and from Step 2 to Step 3.



Approximate Activity Time
5-Minutes

4

Performance Continuum Feedback Method

Analyze and improve performance



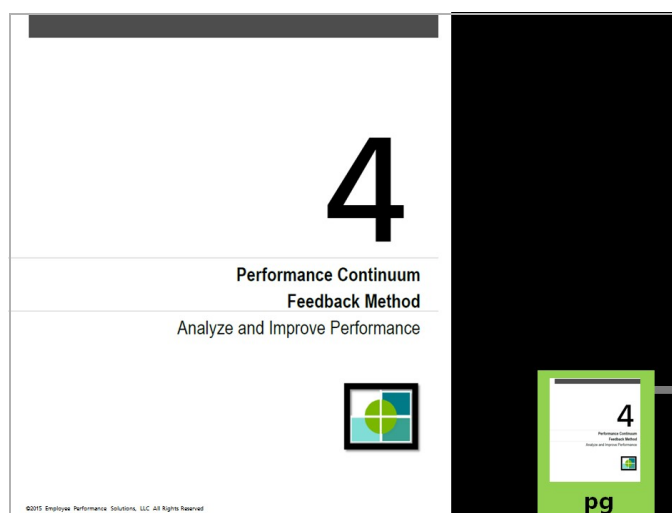
Topic: Facilitator Notes

Topic: Performance Continuum Feedback Method

Slides and Participant Workbook Pages

Facilitator Notes

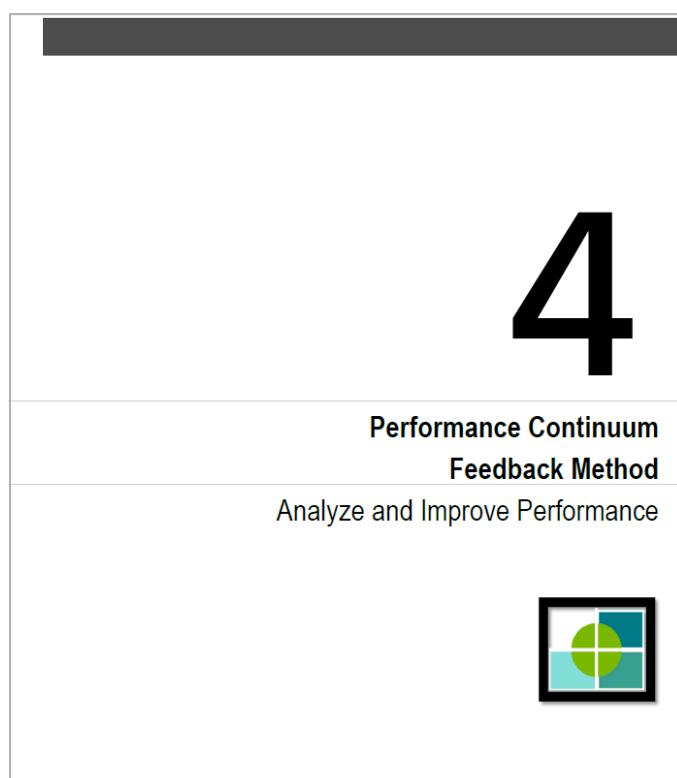
Slide : Performance Continuum Feedback Method (PCFM)



Teach/Explain

The Performance Continuum Feedback Method accomplishes the following:

1. Analyzing current performance.
2. Identifying how an individual can be even more effective in their role.
3. Crafting the right message (the words/talking points that will be used during a performance conversation).

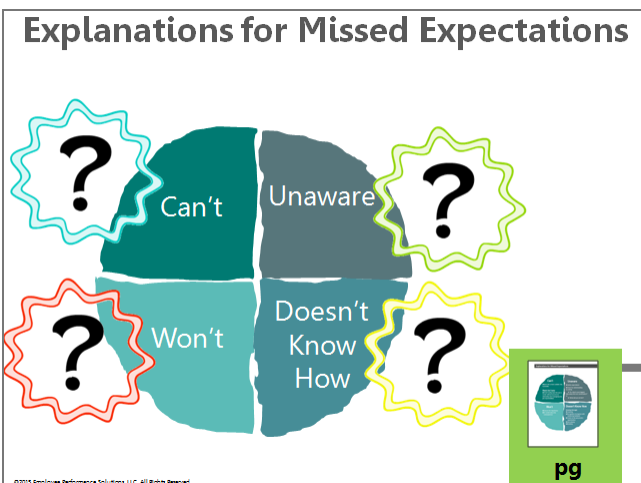


Topic: Performance Inhibitors—Reasons for Off-Target Performance

Slides and Participant Workbook Pages

Facilitator Notes

Slide : Performance Inhibitors



Teach/Explain

Walk through the Performance Inhibitors.

Ask: What is the most likely reason an individual is not meeting expectations?

1. Is unaware
2. Doesn't know how
3. Can't
4. Won't

*The most common answer is "unaware".

Workbook Page: 14 and Card

Explanations for Missed Expectations

Can't

- Move into a more suitable role, if possible.
- Watch Out Factor**
- Resist scaling back the job to create artificial success by eliminating and reassigning key job responsibilities

Unaware

- Clarify expectations
- Check for understanding by asking:
 - "So, what is your biggest take-away from our conversation?"
 - or
 - "What will you do first?"

Won't

- Discuss the importance
- Be candid about the consequences

Doesn't Know How

- Develop through:
 - Coaching
 - Recognition of progress with reinforcing feedback
 - Create on-the-job practice opportunities
 - Role playing
 - Modeling

Using the Employee Performance Continuum

Performance Inhibitors explanations for off-target performance

Performance Continuum Feedback Method

Find the Gap Steps

1. Uncensored Perception(s)
2. Supporting Examples
3. Identify the Business Impact
4. Analyze for the "One Thing"
5. Turnaround
6. Describe the Specifics
7. Describe Importance

Quick-Method

1. Describe what you want to have happen
2. Describe the specific actions
3. Say why it is important

Positive Insight

3 Steps

1. Uncensored Perception
2. Example
3. Positive Impact

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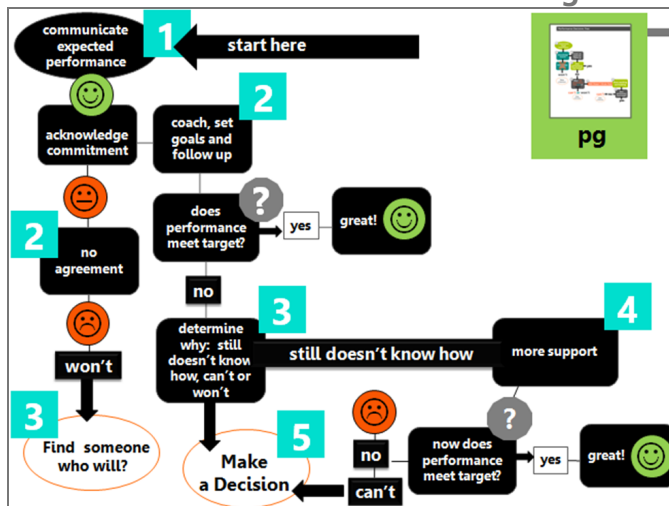
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Topic: Performance Decisions Tree—Helping the Employee Redirect Performance

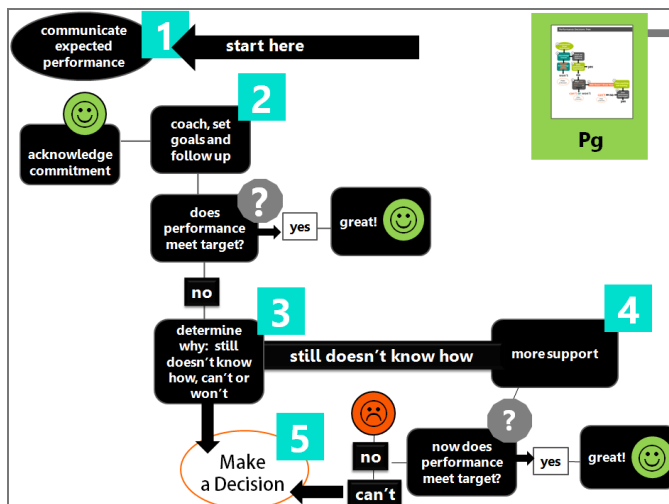
Slides and Participant Workbook Pages

Facilitator Notes

*Slide: Performance Decision Making Tree



Slide Animation Set 1: Employee Agrees



Teach/Explain

*Note to Facilitator About This Slide:

This animated slide is designed to explain the steps to make performance decisions. This image shows the slide *after* the animation is fully revealed.

See page 15 for the corresponding participant workbook page.

Animation Set 1: Target performance is clearly communicated and the employee acknowledges and agrees:

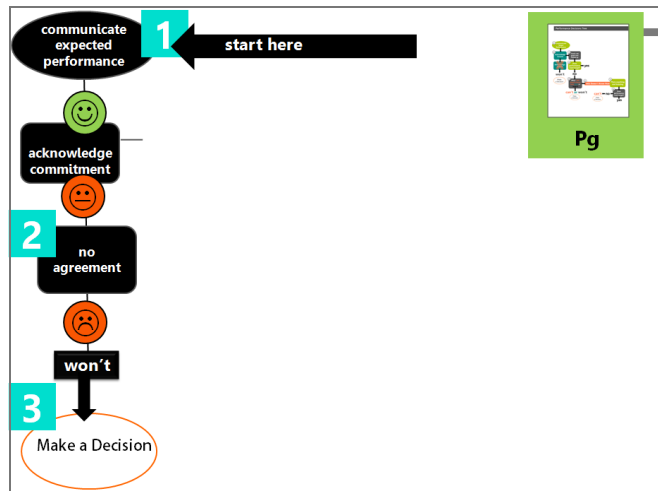
- Walk through the Decision-Making-Tree to explain the steps to help individuals meet target performance:
 1. **Communicate Target Performance**, a description of what you *want* the individual to do.
 2. **Did the employee acknowledge or agree?**
 3. **Provide the proper support** (coaching, training, setting goals, etc.).
 4. **Now does performance meet the target?**
 - If yes, then great.
 - If no, then determine why:
 - **Can't or won't** (decide how to handle the off-target performance).
 - **Still doesn't know how, but is making progress** (provide more support):
 5. **Now does performance meet target?**
 - If yes, then great!
 - If **not** decide how to handle the off-target performance (tolerate/accept or move the individual out of the role).
- **Make this point:**
Some managers say, "But I had a conversation with the person and nothing changed or the change was insufficient".
- **Ask:**
Did the individual receive support in the form of coaching, training, etc? Perhaps that step was skipped. Or, was the information too vague and in-actionable?

Topic: Performance Decisions Tree—Employee Disagrees

Slides and Participant Workbook Pages

Facilitator Notes

Slide Animation Set 2: Employee Disagrees

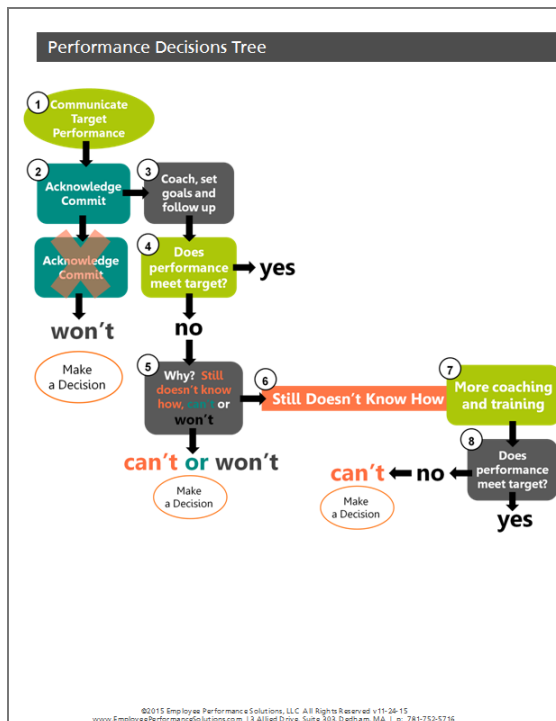


Teach/Explain

Animation Set 2: Target performance is clearly communicated and the employee disagrees/will not acknowledge the information:

The employee's response, of non-agreement or non-acknowledgment, indicates that he/she will *not* make the effort to meet target performance. Therefore we can assume that the employee "won't" work to meet target performance. Advise participants to work with Human Resources to resolve the situation.

Workbook Page: 15



Topic: Case 1: Quite In Meetings

Slides and Participant Workbook Pages

Slide: Analyze Performance Case 1

Steps 1-5

Analyze Performance

Instructions

Read Case 1

Answer Questions 1-5

5-Minutes

Pg

Case 1: Quiet In Meetings
Jack is talented, smart, and an expert in his field. He's good when it comes to voicing his opinion during one-on-one conversations, but when it comes to voluntarily sharing his opinion in a larger group setting he goes mute. There are times when the discussion relates directly to his field of expertise but he will not voluntarily offer input – he needs to be asked a direct question.

When the conversation is moving in the wrong direction he lets it continue that way and doesn't make corrections. As a result the team loses the benefit of his knowledge and experience. There have been times when the team wasted time and money pursuing a faulty idea. Jack has voiced an interest in taking on a leadership role and he repeatedly squanders opportunities to be viewed as someone who has more potential.

Analyze this case by answering the following questions:

1. Where is this individual on the Performance Continuum?
2. Uncensored Perceptions:
3. Examples:
4. Negative Impact:
5. Based on the information in steps 1-3, state the overall Issue:

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Workbook Page: 16

Analyzing Performance

CASE 1:
Jack is talented, smart, and an expert in his field. He's good when it comes to voicing his opinion during one-on-one conversations, but when it comes to voluntarily sharing his opinion in a larger group setting he goes mute. There are times when the discussion relates directly to his field of expertise but he will not voluntarily offer input – he needs to be asked a direct question. When the conversation is moving in the wrong direction he lets it continue that way and doesn't make corrections. As a result the team loses the benefit of his knowledge and experience and there have been times when the team wasted time and money pursuing an idea that should have never made it out of the room. Jack has voiced an interest in taking on a leadership role and he repeatedly squanders opportunities to be viewed as someone who has more potential.

Analyze this case by answering the following questions:

1. Uncensored Perceptions:
2. Examples:
3. Negative Impact:
4. Based on the information in steps 1—3, state the overall Issue :

Case 2:
I am struggling to manage someone who is really talented and delivers incredible results, but members of his project team say that he is a "know it all" and is rude, condescending and extremely difficult to work with".

No one wants to share their ideas in meetings anymore. He shoots down team member ideas before the person has even finished their explanation. Instead of looking for solutions, places blame on others when the team is not meeting project deadlines. He doesn't ask other team members for their input.

Analyze this case by answering the following questions:

1. Uncensored Perceptions:
2. Examples:
3. Negative Impact:
4. Based on the information in steps 1—3, state the overall Issue :

Facilitator Notes



Instructions for Activity

Instruct participants to read Case 1 and answer questions 1-5.

Workbook Excerpt, Case 1:

Jack is talented, smart, and an expert in his field. He's good when it comes to voicing his opinion during one-on-one conversations, but when it comes to voluntarily sharing his opinion in a larger group setting, he goes mute. There are times when the discussion relates directly to his field of expertise but he will not voluntarily offer input – he needs to be asked a direct question. When the conversation is moving in the wrong direction, he lets it continue that way and doesn't make corrections.

As a result, the team loses the benefit of his knowledge and experience. The team has wasted time and money pursuing faulty ideas.

Jack has voiced an interest in taking on a leadership role and he repeatedly squanders opportunities to be viewed as someone who has more potential.

Analyze this case by answering the following questions:

1. Location on the Performance Continuum
2. Uncensored Perceptions:
3. Examples:
4. Negative Impact:
5. Based on the information in steps 1-3, state the overall Issue:

DEBRIEF QUESTION

Ask: "Are uncensored perceptions facts, judgments, or opinions?"

•Answer: judgments and opinions].

Facilitator Note

See answer key on next page. The learning objective is to help participants differentiate between judgments, solutions, examples and impacts.

Topic: Answer Key Case Study 1: Quiet In Meetings

CASE 1: Quiet In Meetings

Jack is talented, smart, and an expert in his field. He's good when it comes to voicing his opinion during one-on-one conversations, but when it comes to voluntarily sharing his opinion in a larger group setting, he goes mute. There are times when the discussion relates directly to his field of expertise but he will not voluntarily offer input – he needs to be asked a direct question. When the conversation is moving in the wrong direction, he lets it continue that way and doesn't make corrections. As a result the team loses the benefit of his knowledge and experience. There have been times when the team wasted time and money pursuing a faulty idea. Jack has voiced an interest in taking on a leadership role and he repeatedly squanders opportunities to be viewed as someone who has more potential.

Analyze this case by answering the following questions:

1. Location on the Performance Continuum

- Upper Left

2. Uncensored Perceptions:

1. Doesn't share his expertise with the group
2. He's probably shy, an introvert, has low confidence
3. Needs a workshop on public speaking
4. Not a team player, but he's good 1-to-1

3. Examples:

1. Won't speak up when the topic relates to his area of expertise.
2. Needs to be asked a direct question before contributing.
3. When conversation is moving in the wrong direction he lets it continue that way.

4. Negative Impact:

1. Team loses the benefit of his knowledge and experience.
2. Team wasted time and money pursuing an idea that should have never made it out of the room.
3. He's squandering opportunities to be seen as a leader.

5. Based on the information in steps 1-4, state the overall Issue:

- Jack does not proactively share his ideas and expertise at team meetings

Topic: Case 2: Disrespects The Team

Slides and Participant Workbook Pages

Slide: Analyze Performance Case 2

Steps 1 – 5

Analyze Performance

Case 2: Disrespects The Team
I am struggling to manage someone who is really talented and delivers incredible results, but members of his project team say that he is a "know it all" and is rude, condescending and extremely difficult to work with".

No one wants to share their ideas in meetings anymore. He cuts off his colleagues, mid-sentence, before the person has even finished speaking. Instead of looking for solutions, places blame on others when the team is not meeting project deadlines. He doesn't ask other team members for their input.

Analyze this case by answering the following questions:

1. Uncensored Perceptions:
2. Examples:
3. Negative Impact:
4. Based on the information in steps 1-3, state the overall Issue:

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Instructions

Read Case 2

Answer Questions 1 – 5

5-Minutes

Pg

Workbook Page: 16

Conversations to Optimize Employee Performance and Potential—Manager's Program

Analyzing Performance Cases

Case 1: Quiet In Meetings

Jack is talented, smart, and an expert in his field. He's good when it comes to voicing his opinion during one-on-one conversations, but when it comes to voluntarily sharing his opinion in a larger group setting he goes mute. There are times when the discussion relates directly to his field of expertise but he will not voluntarily offer input – he needs to be asked a direct question.

When the conversation is moving in the wrong direction he lets it continue that way and doesn't make corrections. As a result the team loses the benefit of his knowledge and experience and there have been times when the team wasted time and money pursuing an idea that should have never made it out of the room. Jack has voiced an interest in taking on a leadership role and he repeatedly squanders opportunities to be viewed as someone who has more potential.

Analyze this case by answering the following questions:

1. Where is this individual on the Performance Continuum?
2. Uncensored Perceptions:
3. Examples:
4. Negative Impact:
5. Based on the information in steps 1-3, state the overall Issue:

Case 2: Disrespects The Team

I am struggling to manage someone who is really talented and delivers incredible results, but members of his project team say that he is a "know it all" and is rude, condescending and extremely difficult to work with".

No one wants to share their ideas in meetings anymore. He cuts off his colleagues, mid-sentence, before the person has even finished speaking. Instead of looking for solutions, places blame on others when the team is not meeting project deadlines. He doesn't ask other team members for their input.

Analyze this case by answering the following questions:

1. Where is this individual on the Performance Continuum?
2. Uncensored Perceptions:
3. Examples:
4. Negative Impact:
5. Based on the information in steps 1-3, state the overall Issue:

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Facilitator Notes



Instructions for Activity

Instruct participants to read Case 2 and answer questions 1-5.

Workbook Excerpt, Case 2:

I am struggling to manage someone who is really talented and delivers incredible results, but members of his project team say that he is a "know it all" and is rude, condescending and extremely difficult to work with".

No one wants to share their ideas in meetings anymore. He shoots down team member ideas before the person has even finished their explanation. Instead of looking for solutions, he places blame on others when the team is not meeting project deadlines. He doesn't ask other team members for their input.

Analyze this case by answering the following questions:

1. Location on the Performance Continuum
2. Uncensored Perceptions:
3. Examples:
4. Negative Impact:
5. Based on the information in steps 1-3, state the overall Issue:

Ask participants to follow along on the workbook page.

Facilitator Note

See answer key on next page. The learning objective is to help participants differentiate between judgments, solutions, examples and impacts.

Topic: Answer Key Case Study: Disrespects The Team

Case 2: Disrespects the Team

I am struggling to manage someone who is really talented and delivers incredible results, but members of his project team say that he is a "know it all" and is rude, condescending and extremely difficult to work with".

No one wants to share their ideas in meetings anymore. He shoots down team member ideas before the person has even finished their explanation. Instead of looking for solutions, he places blame on others when the team is not meeting project deadlines. He doesn't ask other team members for their input.

Analyze this case by answering the following questions:

1. Location on the Performance Continuum

- Upper Left

2. Uncensored Perceptions:

1. "Know it all"
2. Rude
3. Condescending
4. Extremely difficult to work with

3. Examples:

1. Shoots down team member ideas before the person has even finished their explanation
2. Instead of looking for solutions, he places blame on others when the team is not meeting project deadlines
3. He doesn't ask other team members for their input
4. Condescending tone

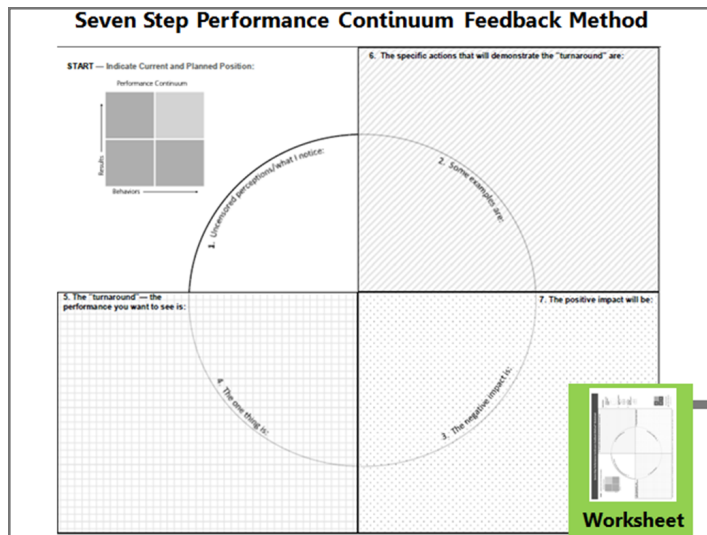
4. Negative Impact:

1. People feel disrespected
2. Team members have stopped contributing at meetings
3. Losing the value of the team!

5. Based on the information in steps 1-4, state the overall Issue:

- He's working in a way that is non-supportive of the value of his colleagues (his team).

Slide: PCFM Worksheet Introduction



Teach/Explain

Introduce the Performance Continuum Feedback Method worksheet. Explain the following:

"The best way to teach the Performance Continuum Feedback Method is by using a case study.

We will use the two case studies will be used to demonstrate the method. The first part involves analyzing the individuals performance, Steps 1-4. The analysis will help you to develop the message/talking points: the performance you want to see".

Workbook Pages 17 and 18

Seven-Step Performance Continuum Feedback Method® Worksheet

START — Indicate Current and Planned Position:

1. Unrecognized perceptions/what I notice:

2. Some examples are:

3. The negative impact is:

4. The one thing is:

5. The "turnaround"—the performance you want to see is:

6. The specific actions that will demonstrate the "turnaround" are:

7. The positive impact will be:

Instructions

1. Indicate current and planned position
2. Complete analysis: steps 1-4
3. Create the message: steps 5, 6 and 7

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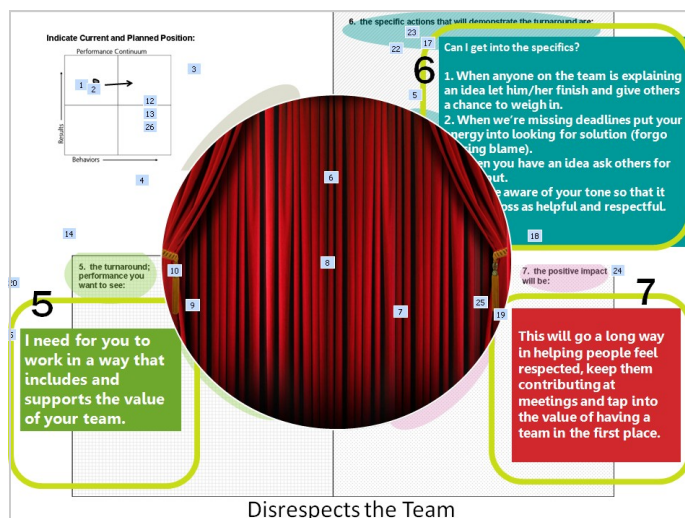
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Topic: Performance Continuum Feedback Method Introduction—Case 2

Slides and Participant Workbook Pages

Facilitator Notes

Slide: PCFM Demonstration Case 2: Disrespects the Team



Note to Facilitator About This Slide

This animated slide is designed to explain the Performance Continuum Feedback Method. This image shows the slide *after* the animation is fully revealed.

Stop Here

Review the next page for more detail on this slide and make sure to practice using the animation in the Power Point slide deck.



Teach/Explain

Case Study 2: Disrespects the Team

Use this animated slide to explain how to use the Performance Continuum Feedback Method worksheet, using Case Study 2, Disrespects the Team, to demonstrate the steps.

Ask participants the questions before revealing the answer. Begin with, "Where do you see this person on the Performance Continuum?"



Instructions for Activity

Ask participants to follow along using the case example in the workbook.

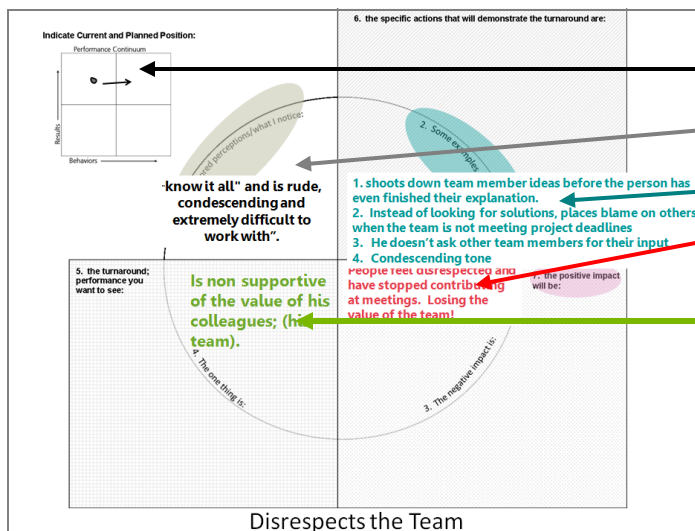
Workbook Page: 17

Topic: Performance Continuum Feedback Method Introduction—Case 2

Slides and Participant Workbook Pages

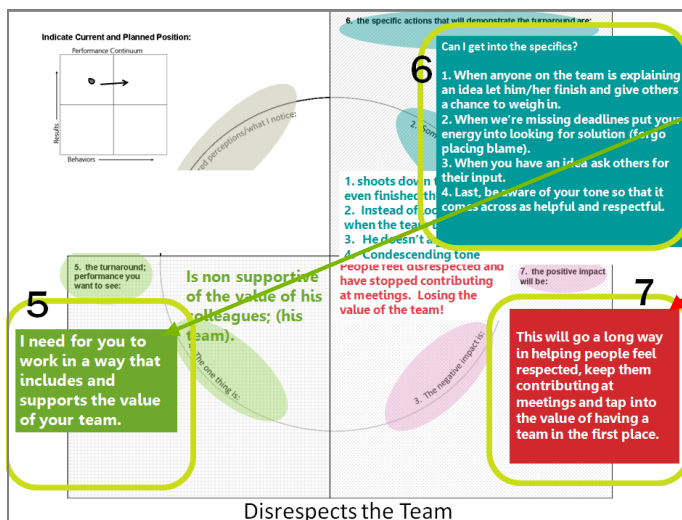
Facilitator Notes

Slide Animation: PCFM Demonstration Case 2: Disrespects the Team



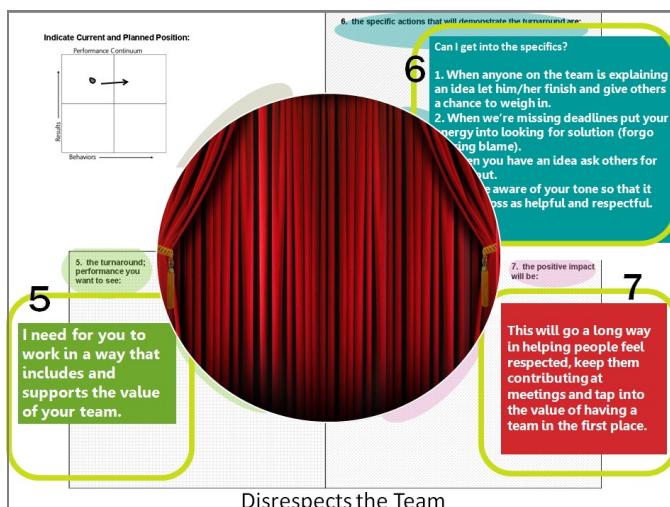
First Set of Animations: the Analysis Indicate "coordinates" on the Continuum

1. Uncensored Perceptions
2. Examples
3. Negative Impact
4. Naming the One-Thing



Second Set of Animations: the Message

5. The Turnaround (reframing the "One-Thing" into the overall "On-Target" performance)
6. Specific Actions
7. Positive Impact



Final Set of Animations: "The Curtain"

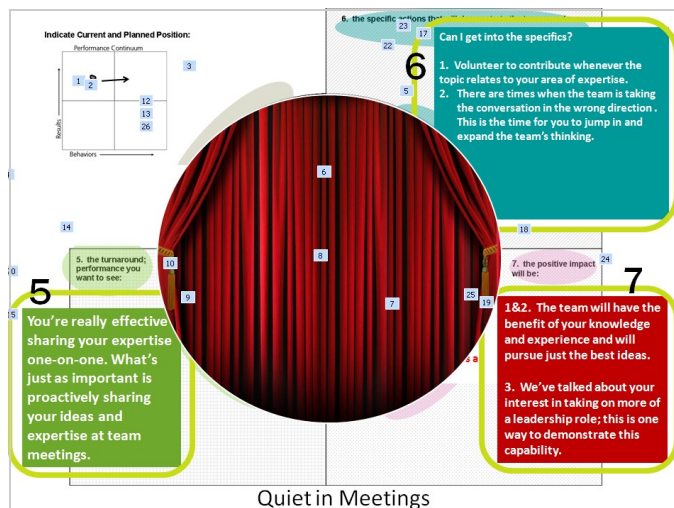
The "curtain" will "close" to emphasize that the steps to analyze performance (uncensored perceptions, examples, negative impact, and the One-Thing) are "behind the scenes" and not part of the message. This helps participants, who are seeing this method for the first time, differentiate between the analysis, which is used to help organize their thoughts, and the actual message/words that will be used in the conversation.

Topic: Performance Continuum Feedback Method—Case 1

Slides and Participant Workbook Pages

Facilitator Notes

Slide: PCFM Demonstration Case 1: Quiet in Meetings



Note to Facilitator About This Slide

This animated slide is designed to explain the Performance Continuum Feedback Method. This image shows the slide *after* the animation is fully revealed.

Stop Here

Review the next page for more detail on this slide and make sure to practice using the animation in the Power Point slide deck.



Teach/Explain

Case Study 1: Quiet In Meetings

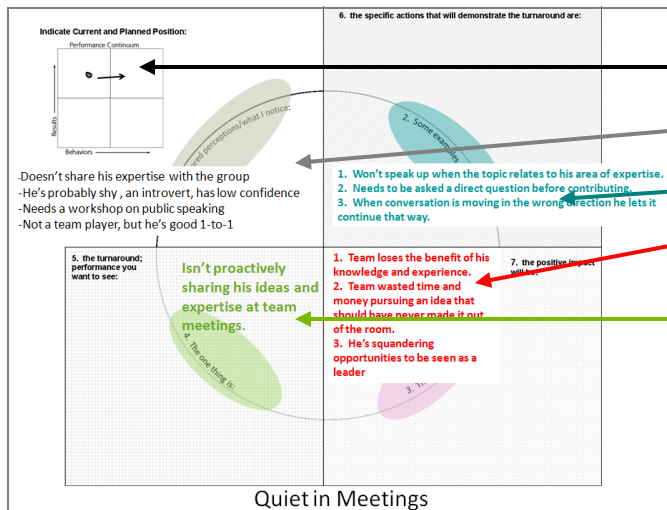
Use this animated slide to explain how to use the Performance Continuum Feedback Method worksheet, using Case Study 1 to demonstrate the steps.

Topic: Performance Continuum Feedback Method Introduction—Case 1

Slides and Participant Workbook Pages

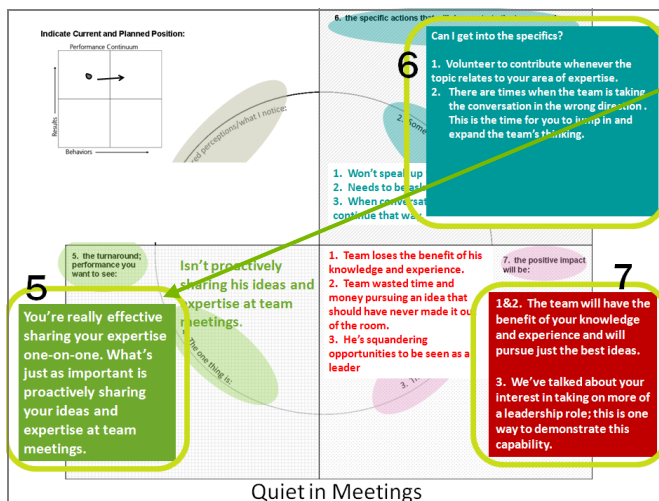
Facilitator Notes

Slide Animation: PCFM Demonstration Case 1: Quiet in Meetings



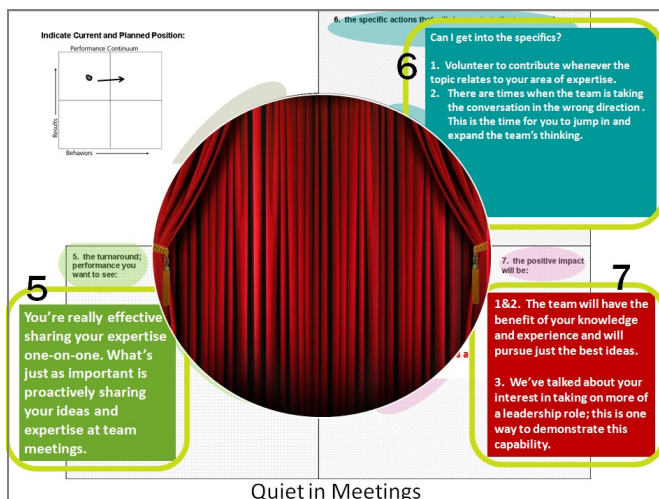
First Set of Animations: the Analysis Indicate "coordinates" on the Continuum

1. Uncensored Perceptions
2. Examples
3. Negative Impact
4. Naming the One-Thing



Second Set of Animations: the Message

5. The Turnaround (reframing the "One-Thing" into the overall "On-Target" performance)
6. Specific Actions
7. Positive Impact



Final Set of Animations: "The Curtain"

The "curtain" will "close" to emphasize that the steps to analyze performance (uncensored perceptions, examples, negative impact, and the One-Thing) are "behind the scenes" and not part of the message. This helps participants, who are seeing this method for the first time, differentiate between the analysis, which is used to help organize their thoughts, and the actual message/words that will be used in the conversation.

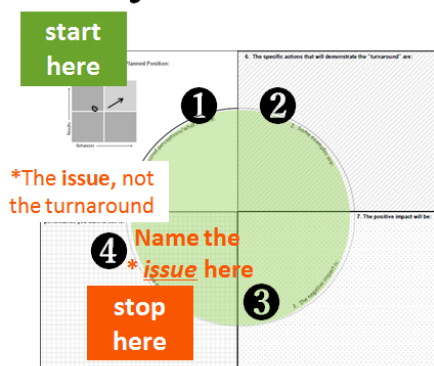
Topic: Pairs Practice—Analyze Performance, Steps 1-4

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Participant PCFM Example Exercise, Steps 1-4

Steps 1 – 4 Analyze Performance



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Instructions

Analyze Performance

Complete **only** steps 1 - 4

Worksheet



Instructions for Activity

Participants Use Their Own Case and Apply the First Four Steps of the PCFM

Option 1 (preferred):

Participants work in pairs. One person share his/her scenario while their partner records the answers on the worksheet.



Approximate Activity Time
15-Minutes Total Time

Workbook Page: 17 (or Worksheet)

Seven-Step Performance Continuum Feedback Method® Worksheet

START — Indicate Current and Planned Position:

Performance Continuum

Results —

Behavior —

1. The current position (what I notice):

2. The specific actions that will demonstrate the "turnaround" are:

3. The positive impact will be:

4. The "turnaround" — the performance you want to see is:

5. The specific actions that will demonstrate the "turnaround" are:

6. The positive impact will be:

7. The "turnaround" — the performance you want to see is:

Instructions

1. Indicate current and planned position
2. Complete analysis steps 1-4
3. Create the message: steps 5, 6 and 7

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Option 2:

Participants work independently to apply Steps 1-4 to their scenario.



Approximate Activity Time
7-Minutes

5

Turnaround and Reframe Performance Gaps

Translate performance gaps into language
describing desired performance



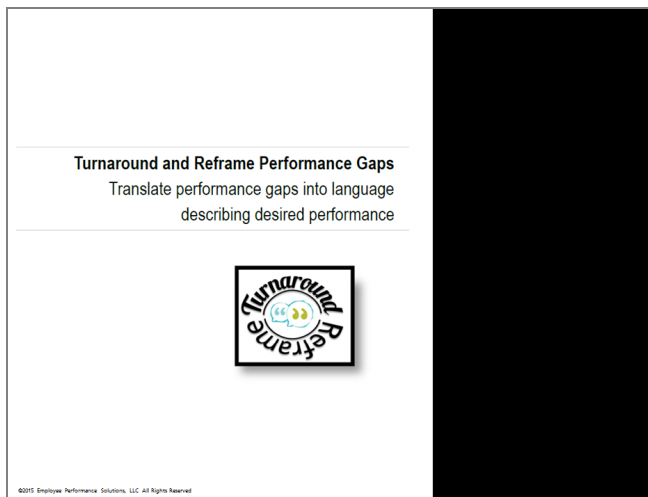
Topic: Facilitator Notes

Topic: Turnaround and Reframe—Describing On-Target (Future Performance)

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Introduce for Turnaround/Reframe Section

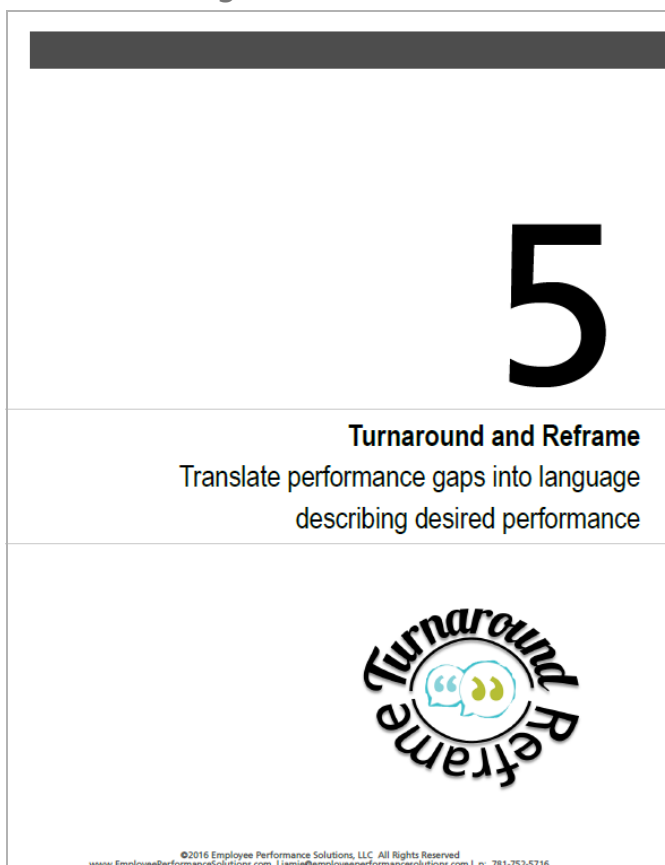


Teach/Explain

Introduce this Section

- Learn how to translate performance gaps into language describing future-focused performance.
- Understand why the human brain is hard-wired to push away “constructive criticism” and select brain-friendly wording designed to be direct *and* reduce defensive reactions.
- Use the Turnaround framework to reframe negative information into a future-focused request versus a criticism.

Workbook Page: 20



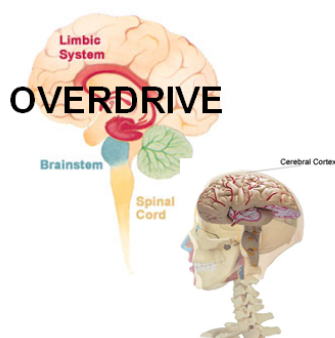
Topic: The Brain on Feedback and Rationale for Reframing

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Reactions to Feedback

Reactions to "Feedback"



Under Attack
Thinking brain shuts down

Emotions crank up

Self-esteem threat
Judgment = recoil response

pg



Teach/Explain

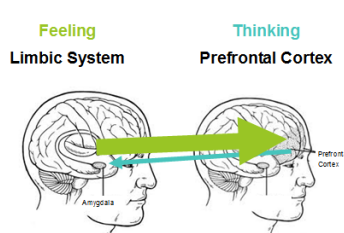
Ask: "How do most people respond to criticism?" (defend, deflect, rationalize).

- Use the animation on this slide to demonstrate that the "thinking/rational part of the brain" is diminished in the face of "criticism". The limbic system, or the emotional brain, takes over in situations where we detect an attack. This triggers the fight or flight reactions::
- **Flight** reaction: withdrawing/becoming quiet.
- **Fight** reaction: acting defensively, rationalizing, or deflecting.
- The solution involves providing information in a way that avoids triggering adverse emotional reactions.
- The goal is to provide information that keeps the individual on the receiving end open to hearing the information versus moving to an automatic emotional reaction.
- Think about taking "the path-of-least-resistance"; having a small conversation versus a difficult or confrontational exchange. Remember that the main goal is to improve performance (not judge or **criticize* past actions).

***None of the tools and approaches in this work prevents in-the-moment conversations. The emphasis in *this* program is to think and talk in terms of *On-Target/expected* performance.**

Workbook Page: 21

Understanding the Brain on "Feedback"



Feeling
Limbic System

Thinking
Prefrontal Cortex

Emotions
Fight, Flight, Freeze
Stress Response
Danger Detection

Intellectual Tasks
Speech
Logic
Decisions
Actions and Consequences
Best Options
Emotional Regulation
Moderating Social Responses

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Topic: Turnaround and Reframe—Conversation Starters

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Conversation Starters


Conversation Starters

Improve...	Develop the ability to...
Get better...	Work on...
Stop doing...	Focus on...
Weakness...	Put your energy into...
You never...	I need for you to...
Don't...	
You shouldn't...	
Weakness...	

YOU'RE DEFICIENT



FUTURE FOCUSED... Possibilities



pg



Teach/Explain

1. Negative Framing:

Reveal the list of negative conversation starters on the animated slide:

Improve

Get better at...

Stop doing...

Etc.

Ask, "What type of reaction do these words create?"

-There is something wrong—a deficiency

2. Target Performance Framing:

Reveal the list of conversation starters on the right-hand side of the slide:

Develop the ability to...

Work on...

Focus on...

Explain that these words focus on future performance—the possibilities and moving forward. This implies a growth mindset.

Workbook Page: 22

Making a Request Versus a Complaint or Criticism

Compare the examples of wording that focus our brain on what we want to have happen versus calling attention to a deficiency:

Request/Future Focused Language:	Deficiency Based Language
✓ Focus on...	✗ Get better at...
✓ Develop the ability to...	✗ Improve...
✓ Work on...	✗ Stop...
✓ Put your energy into...	✗ Don't...
✓ I need for you to...	✗ You never...
✓ Can I ask you to...	✗ You won't...
✓ Can I get your help on something? Will you...	✗ You can't...
✓ I have an idea about how we can work better together. Can I run it by you?	

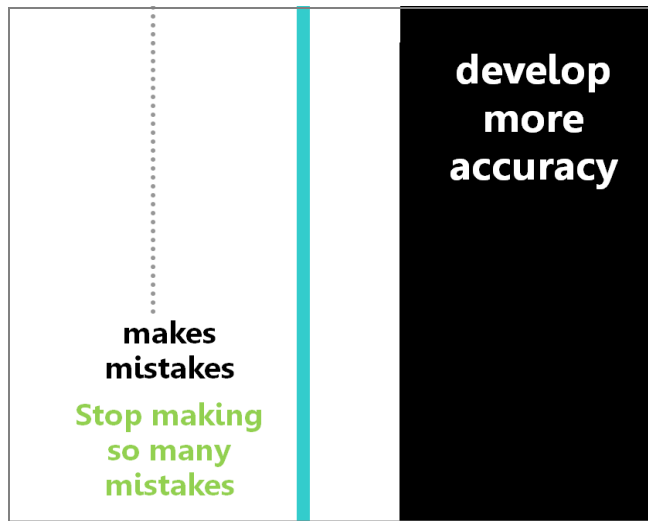
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Topic: Turnaround and Reframe—Group Activity Examples

Slides and Participant Workbook Pages

Facilitator Notes

Slides: Turnaround Examples

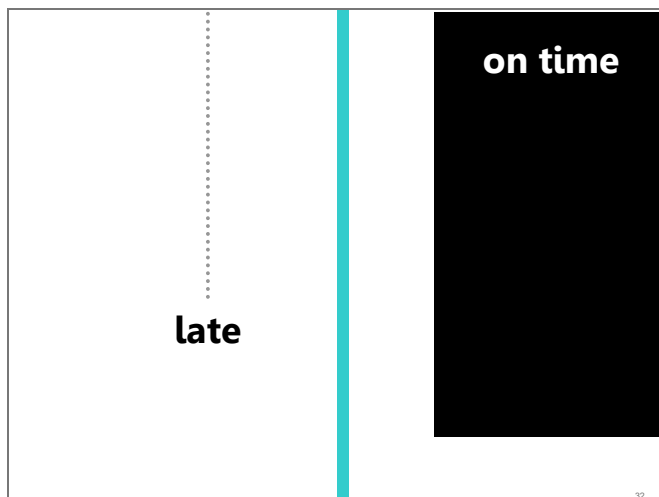


A slide with a white background and a black right-hand section. A vertical dotted line is on the left, and a vertical teal line is in the middle. The text "makes mistakes" is in black, and "Stop making so many mistakes" is in green. The black section contains the text "develop more accuracy" in white.

makes mistakes

Stop making so many mistakes

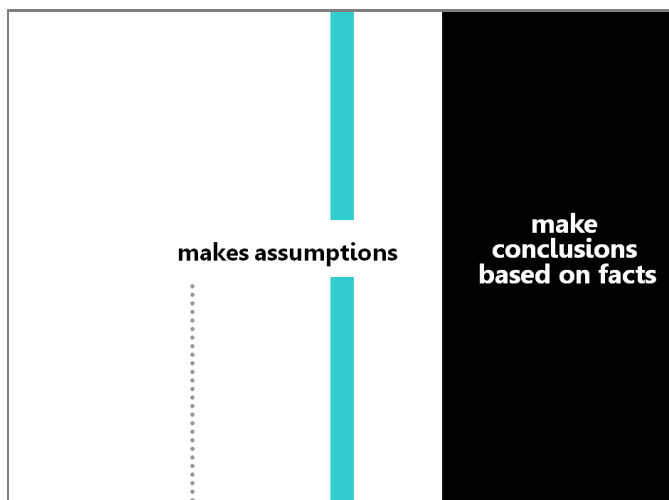
develop more accuracy



A slide with a white background and a black right-hand section. A vertical dotted line is on the left, and a vertical teal line is in the middle. The text "late" is in black. The black section contains the text "on time" in white.

late

on time



A slide with a white background and a black right-hand section. A vertical dotted line is on the left, and a vertical teal line is in the middle. The text "makes assumptions" is in black. The black section contains the text "make conclusions based on facts" in white.

makes assumptions

make conclusions based on facts



Instructions for Activity

Walk through each turnaround example. Here's how:

1. Show the negative/performance gap descriptor.
2. Ask for participant suggestions on how to reframe the negative.
3. Allow time for participants to think of and share ideas for turning around the negative into the target performance.
4. Reveal the answer on the slide.

Points to Make:

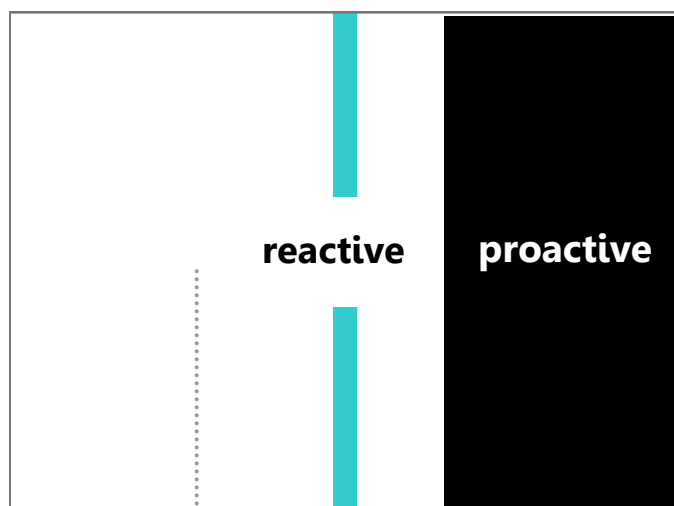
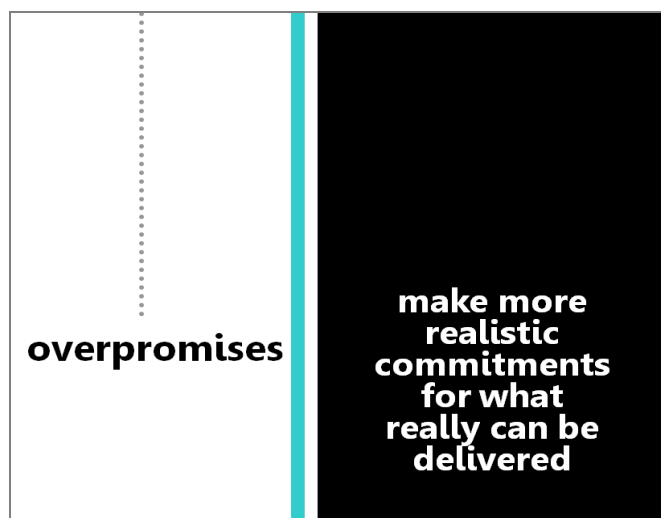
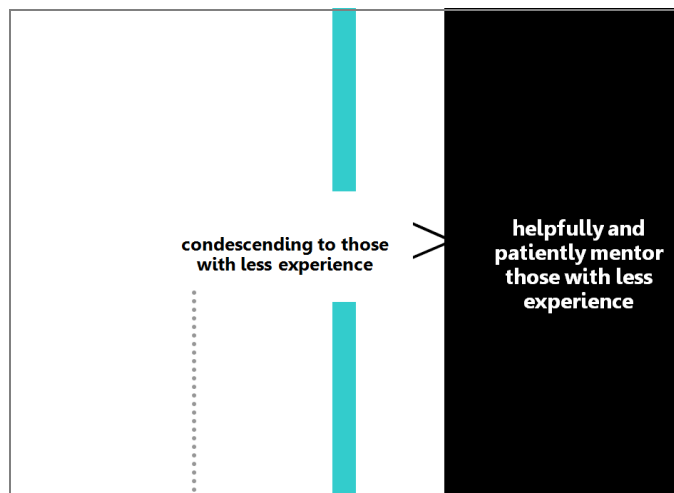
- Turning around the initial mental conclusion to describe almost the opposite is the key skill.
- We are hardwired to think and talk in terms of what is wrong. This is the traditional approach to giving "constructive criticism": State the problem, give examples, and describe the negative impact.
- This is a "recipe" for an automatic defensive self-protective reaction! Criticism leads to defensiveness, deflection and rationalizations.
- Talking about what is wrong is the reason why managers avoid having these conversations in the first place—avoidance of confrontation is human nature.
- Reframing off-target performance to describe the target performance puts the focus on moving forward.

Topic: Turnaround and Reframe—Group Activity Examples

Slides and Participant Workbook Pages

Facilitator Notes

Slides: Turnaround Examples

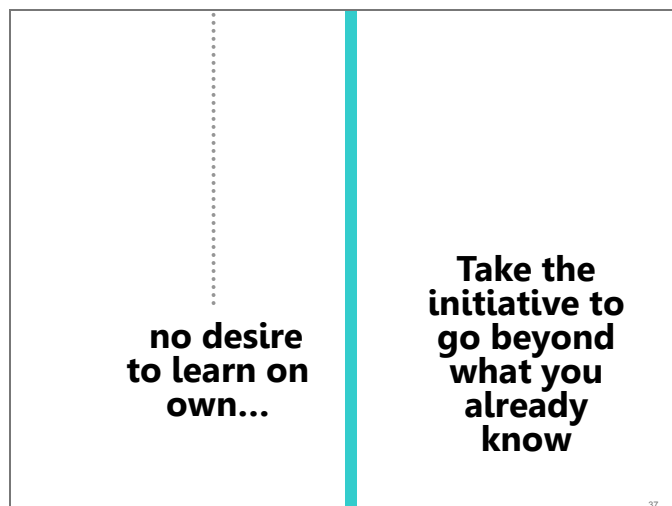


Topic: Turnaround and Reframe—Group Activity Examples

Slides and Participant Workbook Pages

Facilitator Notes

Slides: Turnaround Examples

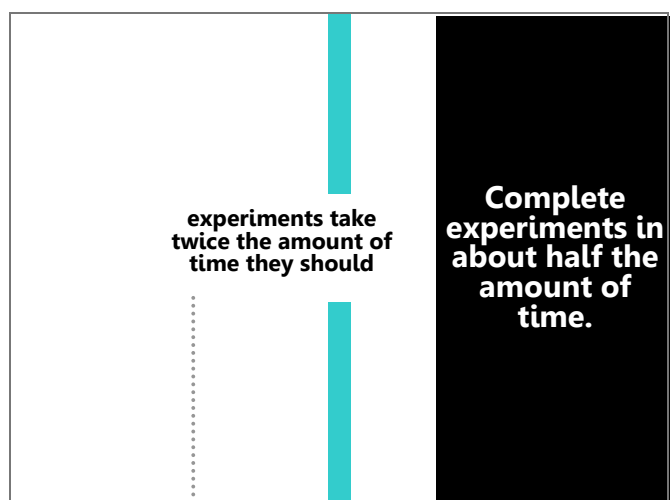


A slide with a white background, divided by a vertical teal line. On the left side, there is a vertical dotted line above the text "no desire to learn on own...". On the right side, the text "Take the initiative to go beyond what you already know" is displayed in bold black font.

no desire to learn on own...

Take the initiative to go beyond what you already know

37



A slide with a white background, divided by a vertical teal line. On the left side, there is a vertical dotted line above the text "experiments take twice the amount of time they should". On the right side, the text "Complete experiments in about half the amount of time." is displayed in bold white font on a black background.

experiments take twice the amount of time they should

Complete experiments in about half the amount of time.



A slide with a white background, divided by a vertical teal line. On the left side, there is a vertical dotted line above the text "keeps interrupting me". On the right side, the text "let me finish what I have to say" is displayed in bold white font on a black background.

keeps interrupting me

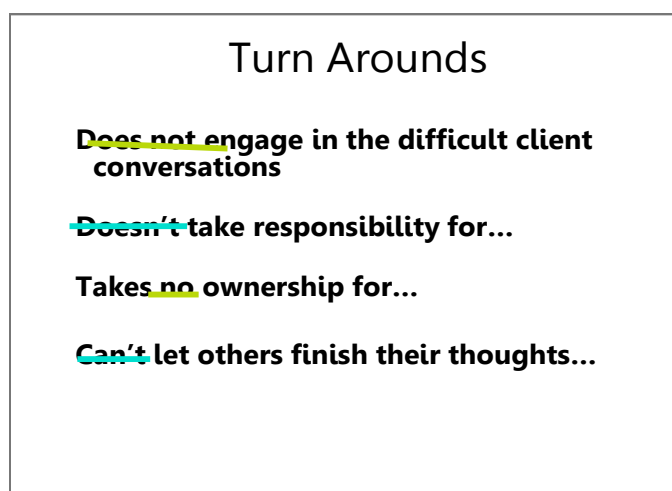
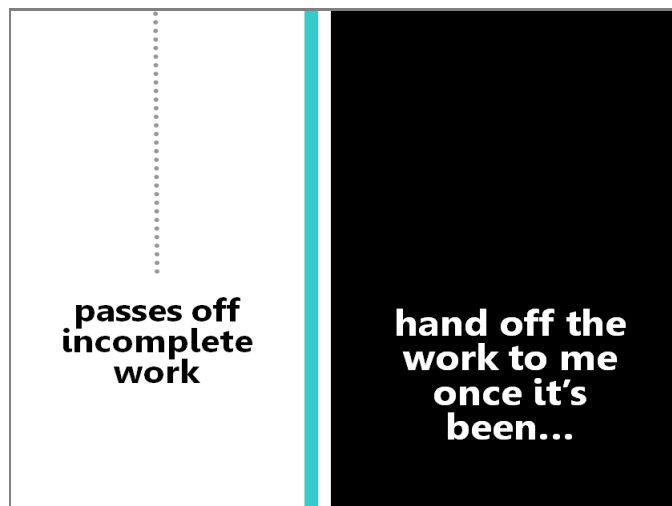
let me finish what I have to say

Topic: Turnaround and Reframe—Group Activity Examples

Slides and Participant Workbook Pages

Facilitator Notes

Slides: Turnaround Examples




Topic: Turnaround and Reframe—Examples for Individual Review


Slides and Participant Workbook Pages

Facilitator Notes

Slides: Scan the Turnaround Examples

Turnaround Examples	
negative	
Requires handholding to get the work done	Independently get the work done.
Raises only problems	You're good at spotting problems. Moving forward when you raise a problem, also propose a possible solution.
Makes bad decisions or uses poor judgment	Carefully consider major decisions.
Does only what is required, takes no initiative	Proactively seek out additional work during any down time.
No sense of confidentiality	Distinguish between public and private information. Be discreet when it comes to confidential information.
Yells, raises voice	Dial down the tone and volume of your voice.
Rigid	Be flexible when it comes to _____
Doesn't see the "big picture"	Focus on the end result, overall goal and outcome.
Turns a 5-minute conversation into an hour	Organize your thoughts and talking points before the discussion, and look for ways to keep these conversations to 10 minutes or less.
Puts others down to make the himself look better	Look past the perceived shortcomings of others and resist the temptation to verbalize this information.
Plays favorites	Be consistent by treating people fairly.

Instructions
Scan the examples



Pgs




Instructions for Activity

Direct Participants to the Turnaround Examples in the workbook. Allow time for independent review.



Approximate Activity Time
5-Minutes

Workbook Pages: 23– 32

Turnaround Examples	
negative	
Doesn't take initiative/let's others take the lead	Be a self starter when it comes to (fill in the blank).
Stirs the pot, causes trouble	Hold onto information that might upset others.
Screams at people	Use a professional tone and voice volume.
Micromanager	Let staff work with greater autonomy; trust your staff to do the right thing; put your energy into more strategic work.
Vague	*Be specific.
Lack of process	Establish a process and develop a plan to follow.
Talks too much	Be concise; develop brevity when expressing your thoughts and ideas; provide a high level overview and save the details for the appropriate time (for example, when asked by the listener to provide more information).
Overcomplicates issues	Simplify and break things down into doable steps.
An "us vs. them" approach	Realize we're on the same team and approach the work and situation as if we all share the same goals.
Comes in late and leaves early	Be on time and work a full day/week.

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Topic: Pairs Practice—Turnaround and Reframe Your Message, Steps 5-7

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Participant PCFM Example Exercise, Steps 5-7

Steps 5 – 7 Craft the Message

Instructions

Complete remaining steps 5 - 7

Worksheet



Instructions for Activity

Complete steps 5-7

Direct participants to complete steps 5-7 to reframe the Off-Target performance into wording to describe the On-Target performance.



Approximate Activity Time
7-Minutes

Seven-Step Performance Continuum Feedback Method® Worksheet

START — Indicate Current and Planned Position:

Performance Continuum

6. The specific actions that will demonstrate the “turnaround” are:

1. Complete analysis steps 1—4

5. The “turnaround”—the performance you want to see is:

4. Done stating is:

7. The positive impact will be:

3. The employee agrees to:

Instructions

1. Indicate current and planned position
2. Complete analysis steps 1—4
3. Create the message: steps 5, 6 and 7

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6

Establish a Regular Conversation Practice

Creating the opportunity to connect and align



Topic: Facilitator Notes

Topic: Establish a Regular Conversation Practice

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Establish a Regular Conversation Practice

6

Establish a Regular Conversation Practice
Creating the opportunity to connect and align

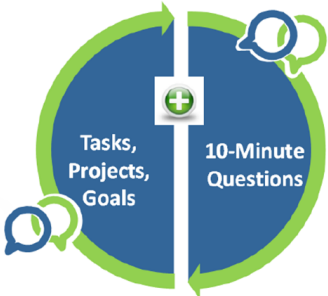




Teach/Explain

Now that everyone has created their feedback message (steps 5-7) we are ready to practice having the conversation. This is an opportunity to hear ourselves verbalizing our talking points and for an observer to provide feedback.


Slide: Tasks Versus 10-Minute Questions



Who schedules this meeting?

Can it be added to an existing meeting?

Other thoughts or questions:



Everyday Work Conversations

Who: Everyone
Frequency: Ongoing (everyday conversations that are already occurring)

10-Minute Questions Conversation

Who: Employee and Manager
Frequency: Consider these factors:


1. The standard in your organization is: _____
2. Use Your Judgment:
New hire: _____
Employee on the "fast track": _____
At-risk employee: _____
3. Should you ask the employee how many times he/she would like to connect? _____

Review the difference between Everyday Work Conversations and the 10-Minute Questions Conversation.

- **Everyday Work Conversations:** While most managers think they are having higher level conversations about performance, the truth usually falls short. Communication typically centers on projects, status updates, issues, etc. There is a place for these conversations which are commonly referred to as one-on-ones.
- **What Makes this Conversation Different**
The three sets of questions in this framework are specifically designed to spark conversation about:
 - what is working now
 - on-the-job development/growth
 - how to work even better together
 - uncover what can be done to be even more effective moving forward

Conversations to Optimize Employee Performance and Potential—Manager's Program

Quick and Effective Employee/Manager Conversation Framework



Everyday Work Conversations

Who: Everyone
Frequency: Ongoing (everyday conversations that are already occurring)

10-Minute Questions Conversation

Who: Employee and Manager
Frequency: Consider these factors:

1. The standard in your organization is: _____
2. Use Your Judgment:
New hire: _____
Employee on the "fast track": _____
At-risk employee: _____
3. Should you ask the employee how many times he/she would like to connect? _____

Other:

1. Who is responsible for scheduling? _____
2. Can the 10-Minute Questions be added to a regularly scheduled one-to-one meeting? _____
3. _____

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pg 6 (updated) | revision: 4/1/2017 10:57:16

Facilitator Tip

Help managers to see that conversations about tasks and projects are important, yet, the 10-Minute Questions Conversation represents an entirely different exchange of information between the manager and employee.

Topic: 10-Minute Questions Conversation and Annual Conversation Guide

Slides and Participant Workbook Pages

Facilitator Notes

Slide: 10-Minute Questions Conversation

Use this worksheet to take prepare for your conversation and take notes. Start with the 10-Minute Questions below, then talk about any follow-up items from your last and today's meeting. Check off questions you've asked, and cover any other work topics (tasks, projects, etc.). Use the 10-Minute Questions below, then talk about any follow-up items from your last and today's meeting.

Manager Asks:

1. What's one thing you've done well at that should continue?
2. What's one thing you'd like to do to make even more progress in my role for what's the next thing for me to focus on?
3. What's one way I could support you that's working best?

Employee Asks:

1. What's one thing I'm doing well at that should continue?
2. What's one thing I could do to make even more progress in my role for what's the next thing for me to focus on?
3. What's one way I could work better with you for what's one thing I could do to support you more?

Manager Asks:

1. What's one thing I'm doing well at that should continue?
2. What's one thing I could do to make even more progress in my role for what's the next thing for me to focus on?
3. What's one way I could support you that's working best?

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1. What's one thing I'm doing well at that should continue?
2. What's one thing I could do to make even more progress in my role for what's the next thing for me to focus on?
3. What's one way I could work better with you for what's one thing I could do to support you more?

your notes

your notes

your notes

your progress from the last check-in

plan for following up on items from this meeting

Here is what I did... 3/24/16

I will...

Date: 3/24/16

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Teach/Explain

The 10-Minute Conversation Questions

Use the animated slide to walk through the three sets of questions that are asked during the 10-Minute Questions Conversation.

Workbook Page: 35

Use this worksheet to take prepare for your conversation and take notes. Start with the 10-Minute Questions below, then talk about any follow-up items from your last and today's meeting. Check off questions you've asked, and cover any other work topics (tasks, projects, etc.). Use the 10-Minute Questions below, then talk about any follow-up items from your last and today's meeting.

Manager Asks:

1. What's one thing you've done well at that should continue?
2. What's one thing you'd like to do to make even more progress in my role for what's the next thing for me to focus on?
3. What's one way I could support you that's working best?

Employee Asks:

1. What's one thing I'm doing well at that should continue?
2. What's one thing I could do to make even more progress in my role for what's the next thing for me to focus on?
3. What's one way I could work better with you for what's one thing I could do to support you more?

Manager Asks:

1. What's one thing I'm doing well at that should continue?
2. What's one thing I could do to make even more progress in my role for what's the next thing for me to focus on?
3. What's one way I could support you that's working best?

Employee Asks:

1. What's one thing I'm doing well at that should continue?
2. What's one thing I could do to make even more progress in my role for what's the next thing for me to focus on?
3. What's one way I could work better with you for what's one thing I could do to support you more?

your notes

your notes

your notes

your progress from the last check-in

plan for following up on items from this meeting

Date:

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10-Minute Questions Conversation Worksheet

This worksheet serves several purposes:

1. Prepare for the conversation
2. To guide and keep the conversation on track
3. To take notes
4. To refer to later on

This worksheet is a tool for you and your manager to use so that you can remember the questions and take notes.

Workbook Page: n/a

Conversations to Optimize Employee Performance and Potential—Manager's Program

Performance Conversation Guide—Annual Meeting

Performance Conversation Guide for Manager and Employees

Instructions:

- Managers: provide this worksheet to the employees you will be meeting with.
- Employees: Use this worksheet to help prepare for and guide your year-end performance conversation with your manager. The purpose of the worksheet is to:
 - Prepare for a two-way conversation
 - Organize your ideas and make notes
 - Anticipate what your manager will want to cover
 - Let your manager know what topics and questions are important to you to cover

After reviewing this document, check off your preferences and the questions you want to ask/review during the meeting with your manager. Keep the original and make a copy and share with your manager 2-3 days before your scheduled conversation.

Who	Topics and Ideas for Questions	Notes
Employee	Start the meeting with: <ul style="list-style-type: none">1. Highlighting some of your contributions.2. Moving forward, discuss your ideas about what's next to focus on.3. Other Topics:	
Employee	Check the questions you'd like to ask your manager: <ul style="list-style-type: none">1. What's one thing I've done well at that should continue?2. What's one thing I could do to make even more progress in my role for what's the next thing for me to focus on?3. What's one way I could support you that's working best?	Who: Each employee will complete this form ahead of the January Performance Planning Conversation meeting. When and What: provide a copy to their manager by: _____ What is this for? To help prepare for and guide your conversation with your manager.
Manager	Areas Covered by the Manager: <ul style="list-style-type: none">1. What's gone well, your contributions and their impact.2. Moving forward, what's next to focus on.3. Other Topics:	
Employee	Check the questions you'd like your manager to ask you: <ul style="list-style-type: none">1. What do you see next for yourself?2. Is there anything you want to be involved in?3. Is there a new skill you want to develop?4. As you think about your professional progress what on-the-job experience would be helpful?5. What's one thing you need to do or know to reach a near or longer-term professional goal?6. What's one of your skills you'd like to start using or use more often?7. What do you wish you knew more about within the organization that would be helpful to your job?	
Manager	Questions for the Manager to Ask the Employee: <ul style="list-style-type: none">1. What's one thing I'm doing to support you that is working and I should continue with?2. What's one way I could support you more?3. What's one way we could work better together?	
Employee	Wrap Up: <ul style="list-style-type: none">1. Explain your two biggest take-aways from the conversation.2. Identify next steps as a result of your conversation, such as follow-up items, new goals, ideas for development, etc.	

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Performance Conversation Guide—Annual Meeting

Use this guide if you are preparing managers for an annual or mid-year performance conversation (and happen to be using this tool in your organization; if not, then disregard this).

Facilitator Tip

Provide this worksheet as a handout. If your organization is utilizing this tool, it will be provided electronically).

7

Conversation Practice

Practice with a partner to try out your conversation




Topic: Facilitator Notes


Topic: Conversation Practice

Slides and Participant Workbook Pages

Slide: Conversation Practice

<h1>7</h1>	
Conversation Practice Practice with a partner to try out your conversation	
	

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<h1>7</h1>
Conversation Practice Practice with a partner to try out your conversation


Facilitator Notes



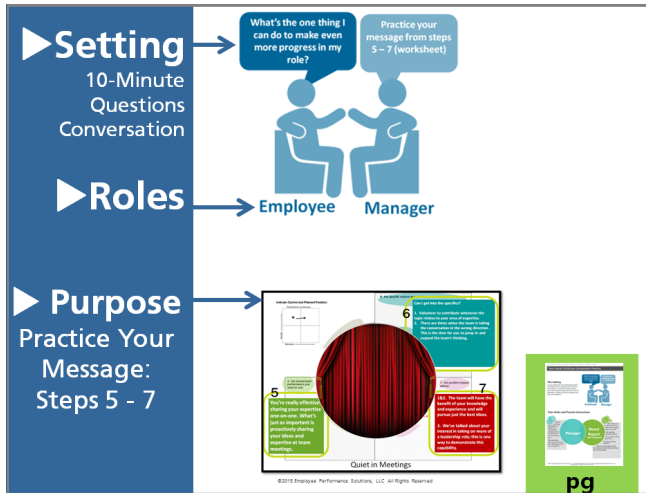
Teach/Explain

Now that everyone has created their feedback message (steps 5-7) we are ready to practice having the conversation. This is an opportunity to hear ourselves verbalizing our talking points and for an observer to provide feedback.

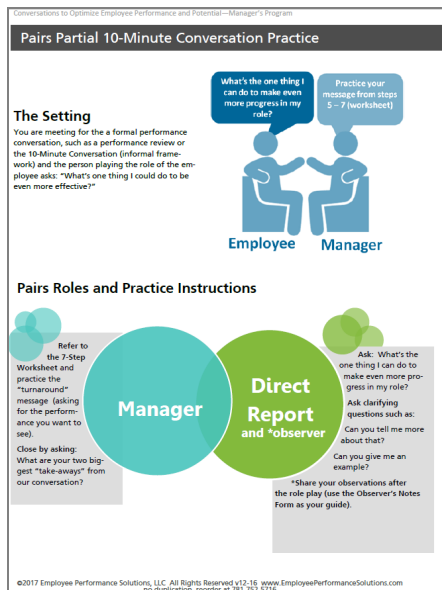
Topic: Conversation Practice—The Setting

Slides and Participant Workbook Pages

Slides: Conversation Practice Setting / Practice



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Facilitator Notes



Instructions for Pairs Practice

Practice Verbalizing Steps 5, 6, and 7

In this pairs practice, one person plays the Employee role to allow the manager to practice their "turnaround" message. The employee will ask:

- "What's one thing I *could* do to make even more progress in my role or "What's next for me to focus on?"

Refer to the 7-Step Worksheet and practice the "turnaround" message (asking for the performance you want to see, steps 5-7).

Roles:

The two roles are: the manager and the person playing the role of the employee (no third person playing the observer role).

The person playing the "employee role" is also the observer. Observations are shared at the end of the role-play (per the instructions on the Observer's Notes Form).

Topic: Conversation Practice—Goals and Tips for Conversation Practice

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Goals for Practicing Your Conversation

Your Goals When Practicing Your Conversation:

1. Reframe: describe the performance you want to see (versus past problems).
2. Describe the specific actions (avoid being vague).
3. Allow the employee the opportunity to respond, ask questions, and add his/her thoughts during the conversation.
4. Be aware of talking too much.



Teach/Explain

Review the goals for the Manager, the person Practicing the conversation:

1. Reframe: describe the performance you want to see (versus past problems).
2. Describe the specific actions (avoid being vague).
3. Allow the employee the opportunity to respond, ask questions, and add his/her thoughts during the conversation.

Slide: Goals for Practicing Your Conversation

Before you Begin, Read/ Review the Three Tips for a Successful Conversation



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4. Ask, "What happens when we talk too much? Does the employee become more confused or clear? **Answer:** more confused Be aware of talking too much.

Instruct participants to read and review Three Tips for A Successful Conversation.

Discuss and answer any questions (before the role-play).

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Practice Your Message, Steps 5—7

Three Tips for a Successful Conversation

1. Keep the past in the past. This is not feedback about past performance; therefore, there's no need to sit past shortcomings. Moving forward, when off-target performance or missed expectations occur, address the issue at the time this way you can reference the issue, because it just happened.
2. Get aside the "evaluate and judge" mindset. This is not an evaluation of past performance. Therefore, there's no need to look backwards and dredge up old examples, weigh blame, or describe negative impact. You're not trying to build a case against this employee or make an argument to support a rating. Adopt a growth mindset—assume, until you know otherwise, that this individual is capable of adjusting and becoming an even better version of themselves.
3. The first conversation—assume the best. This is the first time you are having this conversation—the idea is to paint a picture of the future state. You can't go backwards, but can start from today.

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Topic: Conversation Practice—Observer Notes and Questions

Slides and Participant Workbook Pages

Facilitator Notes

Slide: Observer's Role and Form

Did the manager...

1. Use the turnaround technique?
2. Describe the specific actions he/she wants to have happen in the future?
3. Allow the employee the opportunity to respond, ask questions, and add his/her thoughts during the conversation?
- 4.) Name one positive aspect about how the manager handled the conversation and one aspect that could have been handled differently.
- 5.) When the manager delivered the message was anything said that put the direct report on the defense? If so, what was it? What's another way it could have been stated?

Observer's Role and the Notes Form



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Teach/Explain

Review the role of the Observer and the Notes Form:

First, share your observations about the following:

Did the Manager:

- 1.) Use the turnaround technique?
 - 2.) Describe the specific actions he/she wants to have happen in the future?
 - 3.) Allow the employee the opportunity to respond, ask questions, and add his/her thoughts during the conversation?
- Next, share your suggestions:**
- 4.) Name one positive aspect about how the manager handled the conversation and one aspect that could have been handled differently.
 - 5.) When the manager delivered the message was anything said that put the direct report on the defense? If so, what was it? What's another way it could have been stated?

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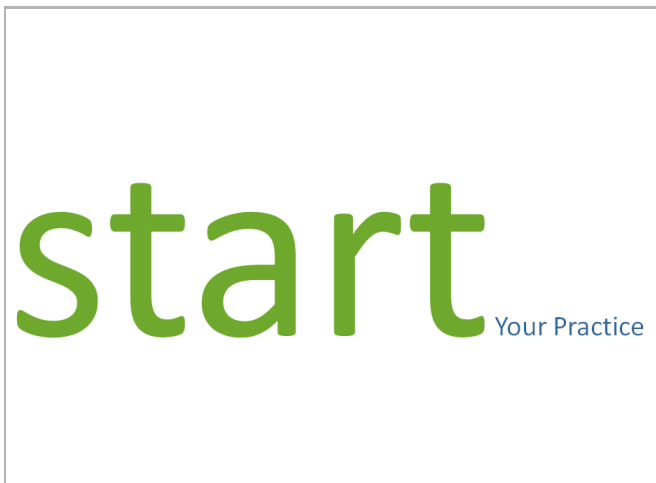
Observer's Notes Form
<p>Observer Instructions: Place your chair away from the manager and his/her direct report yet close enough to hear their exchange. Refrain from talking during the role play. Stop the role play after five minutes, and share your notes for two minutes.</p> <p>Did the manager use the <u>turnaround technique</u>? Provide an example:</p> <p>Did the manager talk about <u>specific actions</u> he/she wanted to have happen in the future? Did those seem clear to the direct report?</p> <p>Did the manager allow <u>the direct report to respond</u>, ask questions, and add his/her thoughts during the conversation?</p> <p>Name <u>one positive aspect</u> about how the manager handled the conversation and <u>one aspect that could have been handled differently</u>.</p> <p>When the manager delivered the message was anything said that put the direct report on the defense? If so, what was it? <i>During the debrief explore other ways it could have been handled.</i></p> <p><small>©2015 Employee Performance Solutions, LLC. All Rights Reserved v17-04-15. www.EmployeePerformanceSolutions.com 13 Allied Drive, Suite 303, Duxham, MA 01922 p: 781-752-5716</small></p>

Topic: Conversation Practice—Start Your Conversation

Slides and Participant Workbook Pages

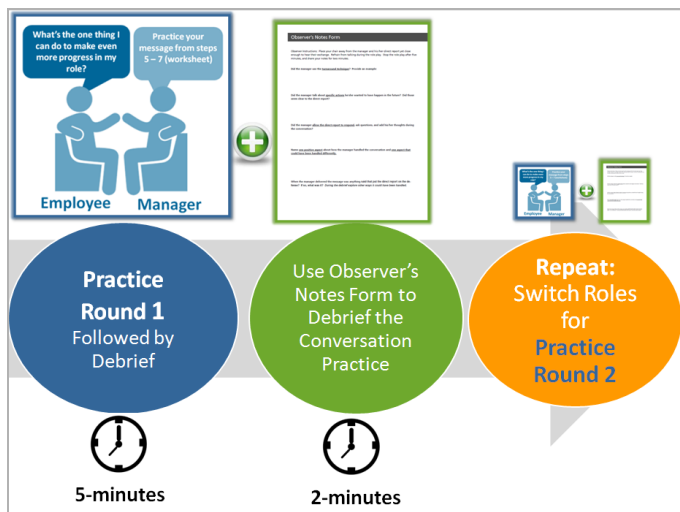
Facilitator Notes

Slide: Start Your Practice



Now that you have reviewed and properly positioned the Conversation Practices, participants are ready to begin the role play.

Slide: Instructions Summary



This slide summarizes the roles, responsibilities, and timing for the Conversation Practice.



Approximate Activity Time
5-Minutes Practice and 2-Minutes for the Observer to share their notes and suggestions.

Total time for this exercise is approximately 14 minutes.



Program Recap and Conclusion






Topic: Facilitator Notes

Topic: Program Recap and Conclusion

Slides and Participant Workbook Pages

Slides: Tools and Skills Recap

Tools and Skills Recap

	Use the Performance Continuum to gain a snapshot of the employee's current performance in terms of Results and Behaviors. The intent is to use this tool to help people grow and move forward.
	Give better quality feedback with concrete examples and the positive impact.
	Analyze current performance to determine what the employee can do to make even more progress. The focus is on moving forward versus reviewing past performance.
	Translate performance gaps, large and small, into language describing the "on-target" performance.
	Practice the Conversation using the 10-Minute Conversation Framework

Please Share Your Insight ...

<p>What's one thing you learned and will use?</p>	<p>What's one thing you have a question or comment about?</p>
<div></div>	<div></div>

Facilitator Notes

Conclude the program

Point out that this session offered a number of tools and new skills. The next step is applying what was learned.

Review the slide

Reminder participants of your organization's expectations to use and apply what was learned. Review your organization's performance management framework, activities, and timeline.

Post-It Note Exercise

Ask participants to use a sticky note(s) to answer the two questions:

1. What's one thing you learned and will use?
2. What's one thing you have a question or comments about?

Suggestion: Review and answer questions before concluding the workshop.



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