

The 9 Steps to a Successful Courageous Conversation

Golden Rule:

“Seek first to understand before being understood”

1. ***Be clear on your best outcome:*** prepare and arm yourself with facts.
2. ***Outline the performance issue:*** remain rational, not personal.
3. ***Ask for their side of the story or how they see the issue:*** seek to understand – reach agreement
4. ***Ask for their explanation of the consequences of not meeting expectations or the issue remaining unchecked:*** seek to understand – reach agreement – confirm the business’ position (seek to be understood)
5. ***Ask for their ideas*** on how to find a solution that will help solve the issue – seek to understand
6. ***Ask how you can help*** – seek to understand – your suggestions (seek to be understood)
7. ***Agree action steps***
8. ***Set a review date***
9. ***Check in the next day/shift***

Firstly arrange a time for you to talk to the person in question.

Simply ask them if you can have a talk at 11am... Make it like an appointment.

Make that appointment a priority.



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Step 1. Be Clear on Your Best Outcome

Think through what the optimal outcome might be for the business, yourself, and the employee. How might you conduct the conversation to best achieve that outcome?

Prepare yourself diligently. Even rehearse it if you are nervous and uncertain. Arm yourself with known facts – never operate on perceptions, speculation, gossip, or innuendo.

Step 2. Outline the Performance Issue

Once in your meeting you say. “Carol, I need to talk to you about (the performance issue in question)”.

Do not make this personal. This is not about them personally; this is about an area of performance that they are responsible for not being met. Make it very clear what the issue is.

Try to angle the issue as being one from a “business perspective” – not you personally (where possible).

AVOID THE SHIT SANDWICH!!!

Step 3. Ask for Their Side of the Story

Give them a chance to explain why they have not been performing in this area. It may be that you haven’t made it clear what to do, provided enough training or even put the person in overload.

Here you are “seeking to understand” – ASK LOTS OF QUESTIONS..... DIG DEEP ON THEIR REASONING.

Repeat back a summary of their reasoning to them to confirm to them you have been listening and to ensure you have accurately taken down their position. Reach agreement as to their reasons why, so you are clearly identifying the PROBLEMS TO BE SOLVED.

Step 4. Ask them What They See as Consequences of Non-Performance

Ask them what they think the effects of the lack of performance (or the issue continuing unchecked) has on the business, other team members, and clients. You are seeking to understand whether they have insight as to their behaviour and the outcomes.

If they don't know or miss some of the effects, take the opportunity to make it clear to them why it affects this area of the business, the team or even them! They may well not know that it has those affects, even if it seems obvious to you. Remind them of previous occasions where the importance may have been highlighted to them or the team.

You might say;

“Carol, by not asking each new client where they came from and recording it, means we cannot know which areas of our marketing is working. This means we don't know if we need to change some marketing and as a result, decrease the number of potential clients to our business. This will hamper the long-term growth of our business and the vision we all agreed on. As a business we simply cannot allow that to happen”

Step 5. Ask for Their Ideas on How to Solve the Issue

Get them involved so you are both on the same side trying to solve an issue. This way it becomes apparent that you are not on a witch hunt. It's not personal. It's just a problem in the practice that needs to be solved, because it is affecting the business.

By involving them, you will get them motivated to increase their performance. This step is crucial in getting a positive outcome from the meeting, and not just creating the resentment of a personal attack on them.

Remember that most people WANT to do a great job. IF they aren't, they are either in the wrong job, or they don't have the tools, to do the job. As a business owner, your job is to take care of these two areas.

“What do **you** think **we** need to do to improve/ ensure this doesn't continue”.

** Also sets you up well for a termination down the track as you have given the training/support they most requested to be better.



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Step 6. Ask How You Can Help

Just to show them that you are committed to helping they correct the performance issue.

Step 7. Agree on Action Steps

Summarise what you have both agreed to do in order to correct the performance issue. You must be clear as to what the expectation is from both sides. This then makes it very black and white what they are agreeing on, as steps to resolve the problem.

Document the action steps and provide a copy.

Step 8. Agree on a Review Date

Agree on a date that you are going to remeasure to see if the performance issue has corrected. You should also give them a clear timeline of when the issue needs to be corrected by. So if it was a case of someone not getting email addresses for every client, you might set a date to agree on developing a script with them to make the asking for emails easier, and then agree that after that, every client will be asked.

Set your review date in a time frame that is reasonable, but not too far in the future. If improvement has not been made, then it must be made clear that the next steps will be more serious.

Step 9. Quick Check In On the Next Shift

This is personal preference, but I feel it is a nice touch to check in with them on their next shift.

“Just thought I would check in after our conversation yesterday. Any further thoughts or anything come up for you since then that you would like to talk through?”

