

IN THE MOMENT FEEDBACK

pre-meeting

Checklist #1

ADDITIONAL NOTES:

Find a private space

In order to ensure that the person is willing to hear you, you need to ensure that they feel comfortable with the situation. Make sure you are where no one else will hear your conversation. While the feedback should be in the moment, it should not be in the same spot if there are others around.

Create clarity of expectations

If you want to give in the moment feedback, you need common expectations on which to give that feedback. Ensure everyone is on the same page, you can't assume they just know what you expect in terms of performance and behaviour. Talk with the individual about how they like to receive feedback.

Build psychological safety

Psychological safety is the belief that the person is safe for interpersonal risk-taking and will not be punished for sharing their opinions. You will need to continuously work on building psychological safety with the individual if they are to listen and improve. There isn't much time before the meeting because it happens in the moment, your job is to make sure they hear you, and that is on you.

Consider the power dynamic

There is an important power dynamic between a person and their manager that can't be ignored. By holding a person's job in your power, relationships are perceived differently by the other individual. If you are perceived to threaten the other individual, they will shut down from what you are saying.

Consider your self-talk

Your self-talk is the conversation you have internally about the upcoming meeting. If your self-talk is negative, that can make the meeting have worse outcomes. Check internal biases for good intent by examining self-talk to ensure the meeting is coming from a place of guidance and improvement. One way to validate self-talk is to talk to a peer and learn their perspective.

the meeting

ADDITIONAL NOTES:

Ensure feedback delivery is aligned with individual needs.

Given the clarity of expectations agreed upon in the Pre-meeting checklist, adjust how you give feedback. Consider their style at the start of the meeting to allow that to frame the way they need to hear the feedback.

Ask for their perceptions of what happened.

Start the conversation by asking them what they perceived as having happened. You will find out what they were thinking and determine the reason they made the choice that they did.

Employee Perspective

Clarify Assumptions

Ask them to articulate any assumptions they had. When you hear their assumptions, you also need to share yours and make sure you are on the same page. If there are mismatched assumptions, it is better to discuss them than let them remain unknown.

Assumption 1 Correct or incorrect

Assumption 2

Assumption 3

Be direct but kind

People need you to be direct but with their best intentions at heart. This isn't punitive but informative. Don't dance around the issue and don't use euphemisms etc. Be honest, it is uncomfortable but by not being direct, you allow the wrong actions to continue.

Stay focused

Stay on topic and focus on the issue at hand. Don't overload the person with all other issues, grievances, or complaints at this time. They will tune you out which goes against your goal in this conversation.

Explain how improvement will help them personally

Make sure they know that this is for their benefit, not punishment. It will help them to understand how a change in behaviour or performance will help them and the team.

Close with them providing confirmation

At the end of the meeting ask the person to state what is expected of them and can they do what you are asking. Ask them how you will know that they are doing what you have asked of them.

IN THE MOMENT FEEDBACK

post meeting

Checklist #1

ADDITIONAL NOTES:

Follow up to ensure alignment

Some people need time to digest. Check in to see how they are feeling and to see if anything has changed. Give people some time to reflect before following up. Follow up demonstrates the value that you put into the feedback; you can't just forget about it.

When correcting behaviour, catch them do it right

After the meeting, if you see them doing the right thing, make sure to point it out to them. Don't leave it to assumption, people need feedback to learn. When they do what you asked them to do, acknowledge that you know they are doing the right things in the right way and on time.

Give grace for time to improve the behaviour

Behaviour doesn't change overnight. If you want to help others improve their behaviour you will need to provide understanding and give it time. By providing understand, with guidance for improvement, you will create a psychological safety for the individual to grow.

Provide support as needed to ensure they are set up for success

People can't do everything on their own. As issues come up, show your support through action and resources. They want to know you are behind them, so you will need to prove it. Otherwise, you will cause them to care less.

Find a mentor, when possible

If available, find another individual on the team or within the company who can mentor the individual. A peer mentor can help a person learn without the stress of working with their manager. It helps when that person has previously faced the same issue and overcome it.

GOAL/EXPECTATION SETTING

pre-meeting

ADDITIONAL NOTES:

Clarity of company goals and strategy

Before setting goals with your team, you need an understanding of the company's strategy. It is necessary in order to lead the team in the right direction. Review your own commitments and how your commitments lead to helping the company meet the business plan.

Review past performance

To be realistic, you need to look at what has been accomplished in the past. Review past performance to ensure that you are setting realistic goals with the individual.

Review team goals

It is crucial that individual goals support team goals. You should consider having a meeting with the entire team prior to the one-on-one meetings. By sharing with the team common goals, they will be able to come together to mutually agree on commitments. You also must consider what you want for each of your direct reports' goals, so you are prepared for the individual meetings.

Confirm reality of expectations

Research the time period for the upcoming requirements. Determine a realistic timeframe for the upcoming goal; however, know that the other person might bring information that changes this timeframe. Review the specific requirements that this individual has from others on whom they will depend.

Tell individual to review their own goals and objectives

To use meeting time most effectively, the other person should review their own goals and expectations. Neither person should come in without any information. It is important for them to have ownership of their own goals.

GOAL/EXPECTATION SETTING

the meeting

ADDITIONAL NOTES:

Create line of sight between the person and the company.

People are motivated by a connection between what they do and the work the company does. There needs to be a clear understanding of how the person adds value to the business unit, and company. Make sure the person understands how the work they do adds value to the business as a whole.

Explain what is needed by the team

The individual needs a clear understanding of team goals and your own goals. If they understand specific needs of the team, they can be empowered to look to solve them. This can also be done in the team meeting recommended in the Pre-meeting activities.

Clarify the current state goals of the individual

It is important that goals are created in alignment with the personal goals of the individual. By including their goals in objective setting, they will be more motivated to work toward what is agreed upon. They need to have ownership of their goals, not you.

Fields to be Filled/Data to Collect:

Current Personal Goal 1

Current Personal Goal 2

Current Career Goal

Working together, choose objectives that work for both sides

In order to ensure that people own their own objectives, it is important that they share authorship. You must determine what is negotiable vs. what isn't. Then you must be strong with the non-negotiable. Decide together, and they will be more motivated to achieve their objectives. If you decide alone, they have built in excuses.

Fields to be Filled/Data to Collect:

Business Objective 1

Business Objective 2

Business Objective 3

Behavioural Objective 1

Behavioural Objective 2

the meeting con't

ADDITIONAL NOTES:

Explain your expectations

Be sure to share both positive and negative consequences for how the work is completed. People need to understand the impact of their work. Consequences aren't just about them. If they are slow, or miss the mark, what is the impact to others and the customer.

Validate their expectation in writing

Toward the end of the conversation, confirm everything and make sure your language is common as well as your expectations. Make sure to put everything that is agreed upon in writing to make sure that you have common expectations to which you can refer.

Common Expectation 1

Common Expectation 2

Common Expectation 3

Common Expectation 4

Common Expectation 5

Create a clear follow-up plan reasonable to everyone.

Make sure they get the support they need without feeling micromanaged. People want autonomy in their roles but do need support. Break the end-goal into a process that can be followed for completion and set a time for a follow-up. Let them know if they need help at any time, they don't have to wait for the next check-in.

Fields to be Filled/Data to Collect:

Follow-Up Process Outline

Timing for First Follow Up

Timing for Second Follow Up

Conditions for Plan to Change

End the meeting with the question:

"What do you need from me to be successful?"

Your job is to set the individual up for success. By giving them this opportunity, you will be able to remove any excuses they have for not achieving their goals. By acknowledging and supporting their needs, you are encouraging them to be successful.

Requirements for support

GOAL/EXPECTATION SETTING

post meeting

ADDITIONAL NOTES:

- Follow up at agreed upon times.**
Make sure that you follow up at agreed upon times. Following up too often may be interpreted as you not trusting them. Not following up may be interpreted as you not caring.

- Keep an eye on circumstances**
In the modern workplace, change is constant. Therefore, you can't treat goals and objectives as "set it and forget it." You need to make sure that you keep an eye on circumstances and what is happening in the environment. Realities shift and they impact your team's ability to achieve their goals.

- Adjust the plan with the individual as needed**
When circumstances change, plans need to change accordingly. By adjusting to external feedback, you will create better outcomes. It is important to be agile with goals as you learn more information.

- Provide support as needed to ensure they are setup up for success**
People can't do everything on their own. As issues come up, show your support through action and resources. They want to know you are behind them, so you will need to prove it. Otherwise, you will cause them to care less.

1:1 CHECK-IN

pre-meeting

ADDITIONAL NOTES:

Look over past documents and notes

Expectations should have already been made clear. Review them to make sure you know what they were and avoid surprises. Review previous goals and objectives, comparing them to their current status.

Build psychological safety

Psychological safety is the belief that the person is safe for interpersonal risk-taking and will not be punished for sharing their opinions. You will need to continuously work on building psychological safety with the individual if they are to listen and improve. Frame the meeting with the individual for their own growth, not punishment.

Consider the power dynamic

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Choose no more than 3 issues to go over

It is important to prioritize your feedback to ensure the message is delivered. If there are too many points discussed, the message will be lost. Your goal is to impact behaviour, limiting your focus will improve your ability to make that change.

Issue 1

Issue 2

Issue 3

1:1 CHECK-IN

the meeting

ADDITIONAL NOTES:

Review notes and goals together

Ensure clarity by going over what was previously agreed upon. Starting from a place of certainty is necessary to be able to have an effective discussion.

Ask them to discuss their perceptions

Ask them how they think things have been. If you have been providing feedback, they will be on track. Ask first what they can think of doing to change your perception. If they don't conclude on their own, provide guidance on how to improve. Remember, if the person comes to their own conclusion, there is an increased chance of them making the necessary changes.

Employee Perspective/Issue 1

Employee Perspective/Issue 2

Employee Perspective/Issue 3

Choose 1 issue to discuss at a time

If they don't articulate one of the issues you wanted to bring up, choose one at a time to discuss. Sticking with one at a time gives greater likelihood that it will happen. By keeping your focus on the issue, it will demonstrate the importance that it has. Don't fall into the trap of bringing more issues up, staying with one will get your point across more effectively.

Explain what it will look like when they improve

It is important for people to have a vision of what ideal outcomes look like. By giving them a clear direction of what is possible, it engages the individual and removes fear of the outcome. This is also an opportunity to help the person what they gain from making the improvement.

Discuss consequences of behavior

The person needs to understand both positive and negative consequences of their actions. The impact of their actions should be explained beyond just the individual. Peers, customers, and the company are all impacted by each person's work.

Positive Consequence 1

Positive Consequence 2

Positive Consequence 3

Negative Consequence 1

Negative Consequence 2

Negative Consequence 3

1:1 CHECK-IN

the meeting con't

ADDITIONAL NOTES:

Acknowledge positive change

Discuss any requested changes in behaviour that you have changed. Talk about what went well with appreciative statements supporting the person's adjustment. While these should be discussed in the moment with the individual, 1:1 Check-in meetings are a good time to emphasize the positive.

AGREE ON COMMON EXPECTATIONS MOVING FORWARD

Validate their expectations to ensure they are both realistic and commonly understood. Share any expectations that you have which the other person might not understand. Clarity is key for the individual to be able to act on the discussion.

Follow-Up Process Outline

Timing for First Follow Up

Timing for Second Follow Up

Common Expectation 1

Common Expectation 2

Common Expectation 3

1:1 CHECK-IN

post meeting

ADDITIONAL NOTES:

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Keep an eye on circumstances

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Adjust the plan with the individual as needed

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Find a mentor, when possible

If available, find another individual on the team or within the company who can mentor the individual. A peer mentor can help a person learn without the stress of working with their manager. It helps when that person has previously faced the same issue and overcome it.

END OF ACTIVITY/PROJECT

pre-meeting

ADDITIONAL NOTES:

Create clarity of expectations

At the beginning of the project, it is important for everyone to be in alignment on mutual expectations. Expectations should be clarified in writing to be able to refer back to them..

Common Expectation 1

Common Expectation 2

Common Expectation 3

Common Expectation 4

Common Expectation 5

Follow up throughout the project

Circumstances changes and new information is learned throughout the life of a project. Keep apprised without micromanaging. to ensure alignment with the individual's goals and the team's goals. If circumstances change during the project, the change should be reflected in expectations. .

Protect the team from scope creep

As team leader, it is important that you ensure the team is set up for success. Scope creep can cause teams to fail for no fault of their own. Take ownership of the scope to help ease the team's commitments while demonstrating that you are on their side.

END OF ACTIVITY/PROJECT

the meeting

ADDITIONAL NOTES:

Review outcomes of pre-defined expectations

Review the pre-defined expectations together, including the outcomes for each expectation. It is important to make sure that you are on the same page about the result of the activity.

Common Expectation 1 - Outcome 1

Common Expectation 2 - Outcome 2

Common Expectation 3 - Outcome 3

Common Expectation 4 - Outcome 4

Common Expectation 5 - Outcome 5

Review what the person learned/skills developed on the project

Discuss with the individual what they gained from being on the activity. Sometimes it requires reflection to understand what was learned or gained from a project. Ask them how these new learnings can be applied to further improve.

Lesson Learned 1

Lesson Learned 2

Lesson Learned 3

Lesson Learned 4

Lesson Learned 5

Talk about prior assumptions

Prior to every activity, assumptions are made about a project. In order to continuously improve, it is important to understand which assumptions were accurate and which weren't. This will help make planning more effective for the next activity.

Assumption 1 **Correct or incorrect**

Assumption 2

Assumption 3

END OF ACTIVITY/PROJECT

the meeting con't

ADDITIONAL NOTES:

Discuss what can be improved individually

Ask them what they could improve on personally for the next project? After you ask the question, count to 60 seconds to yourself, that will provide them enough time to speak. If they can't think of anything, help them find areas of improvement. It is helpful to have them articulate they own areas of improvement to own the solution.

Individual Improvement 1

Individual Improvement 2

Discuss what can be improved organizationally

Improvements should not only be personal. For the development of the team, you should open the conversation to process or technical issues. That will give the person the opportunity to share ways that the team or the company can improve.

Organizational Improvement 1

Organizational Improvement 2

**End the meeting with the question:
"What would yo like to work on next?"**

While you might not always be able to meet their request, it is important to understand their expectations. Depending on the individual and the time, they might be seeking something different or more of the same. It is helpful to set expectations that not every request can be met, while helping them to find the right activity for them.

Desired Next Activity 1

Desired Next Activity 2

END OF ACTIVITY/PROJECT

post meeting

ADDITIONAL NOTES:

Provide written feedback to employee as summary

It is helpful for the individual to have a written summary of the results of the project. The document can be something for the individual to refer to. A written document also provides assurance that there is clarity between the two parties.

Consider the stress of the recently completed activity

Some initiatives end with significant stress. It is important to make sure you don't burn your team out by putting them in more stress immediately. Ensure there is recovery time as that is important to productivity.

Consider their next initiative

Now that they have completed an initiative, think about where they should be going next. Consider their goals as well as the needs of the team/company. If you are uncertain, discuss it with them to ensure alignment.