



Direct Conversation Guide

A people leader's guide to having direct conversations with teammates


Direct conversations with teammates are sometimes avoided because they feel confrontational, awkward, or just plain difficult. However, these conversations cannot be avoided because they come with the responsibility of supervising others. Eventually, one of these conversations will be necessary to communicate the need for change to a teammate, and our hope is that this guide may remove some of the uneasiness and help you feel more confident about having these conversations.

WHY THE CONVERSATION NEEDS TO HAPPEN

Direct conversations are often necessary to communicate your expectations to teammates. If these types of conversations or issues are avoided, teammates may not realize that there is a concern. Without this awareness, a teammate does not have an opportunity to turn things around, and therefore the teammate cannot be held accountable. It is your responsibility, as a leader, to bring issues to their attention, so they can improve.

CONVERSATION STEPS

Step 1 - PLAN & PREPARE:

- **Identify the problem or concern** and the consequence/impact it is having, or could have, on the team or the organization.
 - **Gather all the information** you have. Documents, examples, specific dates or times, any history of behavior, and if there has been anything done previously to address the concerns. Stick to the facts as much as possible so that you can stay objective and neutral.
 - **Identify the solution** and your expectation for their position. What change needs to take place?
 - **Identify how to appropriately convey the message.** How can you communicate your concern in a way that will have the most impact on the teammate? For example, when we deliver messages that place blame, it is human nature to react in a defensive manner. Therefore, think about how you would be most receptive to hearing this message. We do not have control over other people's emotions, but we do have control over how we deliver our message.
 - **Rehearse in advance** of meeting with the teammate. This will build your confidence, as you have practiced, and adjust as needed.
 - **Schedule time** with the teammate.
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Step 2 – 1 on 1 CONVERSATION:

- **Have the conversation in person when possible.** WebEx is a good second pick, and over the phone as a last option. These conversations should not be done through email. It is important to see their nonverbal communication, which can provide helpful information for you regarding your teammate's reaction to the conversation. Having these conversations in-person also communicates to the teammate that the matter holds a lot of importance and that you care about the outcome.
- **Stay on topic and remain focused** to ensure the message is received and understood. If the conversation strays, be sure to bring it back to the topic at hand. Refrain from entertaining deflection from the teammate. You are here to discuss them and their performance, nothing else.
- **Be specific and direct.** Start the conversation by letting the teammate know there is something that you need to bring to their attention, so that you two can work together on a solution. Be sure to state the concern clearly, using the facts you gathered.
- **Invite their input.** It is important to get their perspective on the subject. Be sure to listen, whether you agree with their comments or not. The information the teammate provides to you at this moment can help you better understand why the issue is occurring and identify opportunities for solutions.
- **Do not get into a debate.** If an argument starts to arise, remain professional and use your listening skills. If the teammate continues to escalate, it is fine to take a break from the conversation and revisit when they have some time to digest the information. End the conversation and schedule a time within the next few days to come back together.
- **Support the teammate.** Show compassion and ask how you can support them to improve.
- **Summarize the conversation.** This should be done at the end the conversation to close things out. Briefly review the initial concern and what you both discussed as the solution.

Step 3 - FOLLOW-UP & CHECK IN:

- **Send an email after the conversation that documents what you discussed.** This will provide supporting documentation if the behavior or conduct does not improve. It also allows for an additional opportunity for the teammate to receive the intended message.
 - You can use the provided 'Follow Up Email' Template.
- **Follow-up with the teammate** within the first couple of days following the conversation. This should consist of checking in with the teammate to ensure you acknowledge how they may be feeling, and they understand your expectations.
- **Check in often and as needed.** This should happen monthly, at a minimum, and can be done during your regularly scheduled 1 on 1 time. Depending on the situation, review the teammate's progress with them. If you see positive change, be sure to let them know! Be clear about how much progress you are seeing, if any. If performance is not where you expect it to be, revisit your expectations and previous conversation with them.
 - Follow up each subsequent conversation with the 'Follow Up Email' Template.