

STEP 3: GUIDE YEAR-END REVIEWS

Help people answer 'Where next?'

The annual review summarises all the progress update discussions into one overall picture. It then uses this information to help people move forward more strongly.

PREPARATION

Plan the logistics, including a private place to talk. Both you and the team member should:

- Consider how their achievements matched the goals set and the impact made over the whole cycle.
- Consider the broader operating environment and level of challenge.
- Collect feedback from key stakeholders
- Consider their progress with career goals.

FACILITATE THE DISCUSSION USING OIL

Using your normal style together, take a minute to set the scene warmly. Recap that this is an important opportunity to reflect and then look ahead.

Follow the **O.I.L.** structure to keep the conversation forward-looking:

O: Outcomes Lead with recognition for key successes. Ask your team member to summarize their overall outcomes.

I: Insights Analyze the drivers behind their performance with each goal:

- Explore the impact of the external environment.
- Explore insights into their personal capabilities and actions.

L: Learning Focus the greater part of the conversation here.

- Explore how to leverage these insights moving forward.
- Capture key learning for their next goal-setting conversation.

FIVE GREAT QUESTIONS

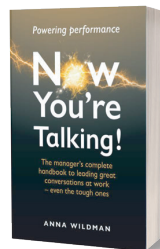
Which single thing...

- ...is a key strength you can use more of?
- ...is important to do differently?
- ...do you like most about working here?
- ...do you like least about working here?
- ...can I do to help you succeed?

Need help with tough conversations?

Learn how to lead 20 essential conversations including:

- Handling disruptive behaviour, divas, poor performers
- Discussing a low performance review/pay award
- Addressing team conflict





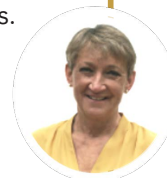
All these and more in **Now You're Talking!** The manager's complete handbook to leading great conversations at work – even the tough ones by Anna Wildman.

"A fantastic resource for any manager."
HR Director magazine

Drop me a line!

I'd be delighted to explore how best to help you feel *skilled* and *confident* in leading performance conversations.

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Pocket Guide to LEADING GREAT CONVERSATIONS AT WORK



OIL IN THE **ENGINE**

*Performance conversations are the oil
in every organisation's engine.*

STEP 1: SET CLEAR GOALS

 Help people answer
'What's my job?'

THE CONVERSATION

- **Open warmly** Increase your team member's sense of purpose by:
 - Providing a brief overview of where your organisation is headed.
 - Covering why their role matters in achieving that aim.

- **Identify three to six key outputs** Working jointly:
 - Consider changes to team/unit goals and bring forward key learning from their previous review.
 - Pinpoint the main priority headings.
 - Include a development and career goal.

- **Check that outcomes are SMART** Work through each heading to ensure goals are:

Specific: Clearly stated, ideally as an action e.g., to increase, decrease, build, develop, deliver, implement, coach, etc.

Measurable: Identifies what success looks like (while maintaining flexibility) e.g., Results, financial goals, customer/client outcomes, people goals, demonstration of competencies, learning outcomes, contribution to colleagues, innovation.

Achievable: Explore what support they need to achieve the goal e.g. budget, skills, information.

Relevant: Aligned with team strategy, the right goals to focus on.

Timebound: Set interim checkpoints to track progress. Confirm 'best' and 'latest' deadlines.

- **Manage risk** Identify any boundaries or limits. Conduct a "pre-mortem" about what might go wrong. Explore where they have flexibility to take 'safe' risks.

- **Capture the plan and update when needed** Close by:

- Thanking them for their contribution.
- Scheduling their first progress update.
- Finishing with a positive comment about the year ahead.

STEP 2: FACILITATE FEEDBACK

 Help people answer
'How am I doing?'

- **Hold ten-minute check-ins each week** to maintain focus.
Ask:

- How did last week go?
- What are your priorities for this week?
- What help do you need from me?

- **Hold progress updates every 8 to 12 weeks.** Give recognition for progress, adjust goals, build strengths, close any critical gaps. (The aim is no surprises at year-end)

BUILDING STRENGTHS

Give recognition for both results and effort. Encourage people to see where they add value; there's often more benefit in leveraging strengths than improving weaknesses. Tap into what invigorates each person. Ask:

- What's going well?
- Which of your skills and capabilities bring special value?
- How might you use these abilities more?

CLOSING CRITICAL GAPS

Select improvement/development areas carefully

Building skills takes effort so keep this focused on one or two actions only.

Frame purpose positively Explain why this development is important. Ask:

- Where do you want to go with this capability?
- What skills and knowledge do you need to get there?
- What help do you need from me?



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USE CEDAR™ TO FACILITATE FEEDBACK



C CONTEXT – Explore the situation *jointly*. How important was it? What was the impact? What was their intention?

E EXAMPLES – Illustrate with specific examples. This may be one big example or two or three smaller ones. Ideally these will come from your team member guided by you.

D DIAGNOSIS – Explore the underlying cause. Ask open questions to build critical insight. What were the reasons that it went well / not well?

A ACTION – Ask what actions they want to take. This plan needs to be clear and led by your team member. Add your suggestions where helpful, just not too early.

R REVIEW – Ask when would be a good time to follow up. Help people to embed new behaviours through deliberate practise.

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