



Preparing can help make Performance Conversations Work for You

by Bill Cropper – The Change Forum

Based on materials and experiences drawn from our conversational coaching class and guide on Making Performance Conversations Work for You © Bill Cropper 2015

Managers generally play the lead-role in initiating and engaging staff in conversations about performance. But let's not forget staff. They're the other key player when it comes to making performance conversations constructive and positive...

It's up to managers to make it safe for staff to engage, deal with their defensiveness and make them meaningful. At the same time, it's also up to staff to overcome any natural dislike they may have of them, accept they may sometimes be on the receiving end of some negative or clumsy feedback, and approach performance conversations in constructive and positive ways to identify things that enable them to do their job better and grow their personal capabilities. That way, everyone wins.

Trial or Treat?

When performance conversations are constructive and positive, they can help staff lift their game where it's needed and expand their role into new frontiers so they keep growing in the job. But talking to your boss about how you're going can be a bit uncomfortable too. Staff can feel reluctant, guarded, defensive, awkward or on-edge, even if they think they're doing pretty well! Why?

Well, think of things like keeping the conversation two-way, touching on sensitive topics, being frank and open about things you find difficult or challenging, getting feedback about your performance that may not always be put the way you'd like, or highlighting your achievements and what you do well without feeling like you're self-promoting or being a big-head.

And let's face it, not all leaders are that skilled at conducting performance conversations and making them the meaningful, motivating or positive affair we'd like to think they could be.

- ❑ They run them as a tick-and-flick, compliance task they just want to get out of the way
- ❑ Some monopolise the conversation and make it a one-sided affair where staff feel unheard and walk out feeling they didn't get to raise issues that were important to them.
- ❑ Some seem to have a knack of getting us off-side by putting things in negative ways rather than focus on the positive, or by saying the wrong things that raise our defensiveness
- ❑ Or they talk-down to you, make people feel judged, or make it unsafe to engage in the process, because staff feel blamed, ticked-off or troubled by how the conversation's going.



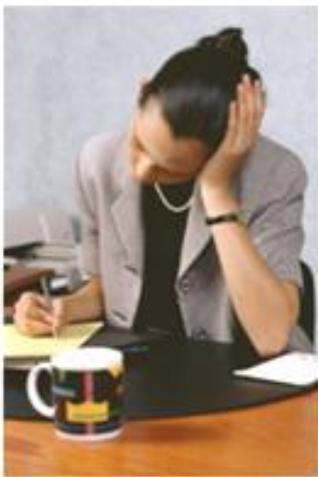
- ❑ Some staff feel they knit-pick a few small things and overlook major contributions and talents or you feel as if your performance is fine but they seem to have an issue with it you just don't get

While most performance conversations training is only for leaders, we believe they work better when staff also feel better-equipped to participate in them.

Our clinic on [Making Performance Conversations Work For You](#) attempts to make them less of a trial and more of a treat by giving staff tips and tools to respond to, and engage more positively, in the whole process. It's structured around *12 Pointers for more Positive Performance Conversations* and we thought we'd share the first one with you.

Plan to Prepare is our first pointer...

Being prepared means having facts, knowing what points you'd like to bring up and making an honest and frank assessment of yourself. It's about doing some of the groundwork before you go into your performance conversation. You'll feel more prepared if you do which can boost your confidence a bit.



Planning and preparation always pays off. It can help your manager get a broader picture of your performance and highlight aspects of your role or contribution they may have overlook or unconsciously downgrade.

It can also help you exercise some control over the conversation and what gets covered, rather than play a passive role where you become the silent recipient of feedback and direction from your manager. **Here's a few suggestions...**

1. Make an Issues List

At the least, take time to list down what issues you want to bring up about your performance. You'll feel more equipped to deal with whatever comes up then, than if you just launched into the conversation unprepared, taking it as it comes. This might include writing down what you see as your performance strengths and drawbacks, listing questions you'd like to explore about your performance and any specific aspects you want feedback on. You might also make a note to ask your manager what issues they want to cover with you and try to anticipate what they may be.

2. Honestly Self-evaluate Yourself

There's research to show that if you do your own self-appraisal first before going in to see your manager, you'll end up having a much more constructive performance conversation. Going into your appraisal having done some groundwork of your own certainly can't hurt. Review your achievements, challenges, difficulties and milestones. But make a note to be neutral, objective and honest with yourself. Don't deny failures or just do good news stories. This comes across as self-promoting.

Also don't just appraise from your viewpoint. Anticipate how your boss may see your performance too. Your self-appraisal may remind your boss of good things they've overlooked or even weak-spots they might feel uncomfortable raising. By the same token, self-promoting or glossing-over performance problems, brings down your credibility.

3. Assemble a solid information base...

...any relevant facts, figures and background information. Review your PD, goals and development plans from last appraisal. How have you been since then? What about project reports you've done? Letters of commendation from customers or other kinds of endorsement? Will these help you recall performance highlights, milestones, problems or challenges? Do you keep a performance journal? What skills do you need? What projects did you enjoy or struggle with? Having this kind of detail to hand will help you and

your boss get a broader, more factual view of your performance. Your manager may not be aware of all the useful things you've done, especially the small things that really add up – so tell them but don't overdo it

4. Show you've worked on weak-spots

We all have them. Don't wait for your manager to bring them up. Take the initiative. Mention a couple of struggles or where others may note your performance lacked something. This shows you're not afraid to talk over these and you're honest enough to admit your shortcomings, rather than gloss over them. Show how you've worked on your weak spots or grown your skills. For example, revisit your last appraisal and show how you addressed any adverse feedback or improvement areas. Don't just claim it either – be ready with a few examples.

5. Be ready to raise contentious issues

It's not all smooth sailing. If you've had choppy weather performance-wise, be prepared to raise and discuss it if some issues have been contentious, or if you and your boss differ in certain areas over your performance. Sometimes your manager wants to discuss a specific performance issue, outside the appraisal process. Your perspective of this issue is bound to be different from theirs.

Either way you need to decide how to handle this. For instance, denial, excuse-making, blaming, arguing won't get you constructive outcomes. Be prepared to hear a different story. If you don't, you'll be hijacked into refuting their version outright. The conversation must be two-sided. You must hear their perspective first, then share yours and then explore the difference. If topics are touchy, practise raising or responding to them by writing them out beforehand.



6. Map goals to discuss for the coming period.

Your appraisal shouldn't stop with just a review of past performance. See if you have time to turn to upcoming activities. Don't wait for your manager to give you your goals. Take the initiative and draft some potential goals based on your job, division or organisational goals. You can review and refine these in your meeting with your manager.

7. Bring up new frontiers or next developments

Identify areas where you'd like to expand your skills, experience or expertise as part of your workrole, personal or career development. Have a plan for the future ready to discuss. This is a good opportunity to develop your role further so have a list of future goals you plan to pursue and skills you'd like to develop over the next year. Where does your manager see you going? Where do you see yourself going? What opportunities are there for you? What steps can you take?

8. What may lead you to blow-up or break-down?

In some performance conversations, especially difficult ones, both of you may be provoked into over-reacting. What's likely to set you off? List your feelings and emotional triggers. Knowing your feelings beforehand won't stop them, but it does have a calming effect and you'll be more emotionally prepared for the real thing. It's like an early warning system.

9. Note any specific plans to correct performance gaps

If your performance conversation is more to discuss a particular issue or gap your manager perceives, better to do some thinking about it beforehand. What do you think next steps should be? What action might be required? What new behaviours may be expected? What alternatives you can you think of?

What help do you need? Take a mutual problem-solving approach with your manager and see what comes of it. Ask them for their ideas too.

10. Complete your self-appraisal form.

Finally complete your formal self-evaluation if that's what your organisation does. This should be the same form as what your manager fills out so you can compare. Be honest in your ratings and hand-in your form early. It can't hurt for your boss to have a look at it beforehand. In fact, ideally, share your ratings and any self-evaluation you do with your manager before your meeting. It helps them to prepare too, and flags differences and issues for them.

While attending to these preparations won't mean your performance conversation will always be *easy* – especially if there's some *touchy topics to discuss* – it will definitely make it *easier* as well as ease some of that anxiety that's often associated with doing performance appraisals. If these things are written down before your appraisal, it will be much more productive and you'll also be more likely to bring up some of these things for discussing during your conversation.

To work well, performance conversations should be two-way...

Our [***Making Performance Conversations for You***](#) clinic attempts to level the playing field by helping staff (that's you!) understand what a good performance conversation should be like and equipping you with tools to respond to and engage more positively in the whole process.

See our on-line [Course Calendar](#) at www.thechangeforum.com for dates our public clinics are coming up in your area. And if you've a group of 10 or more, we're happy to come to you. Use our on-line [Enquiry form](#) or call **Bill Cropper** direct to discuss arrangements for an in-house clinic at a venue of your choice.

More on [***Positive Performance Conversations***](#) on-line at www.thechangeforum.com.

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