

CRUCIAL CONVERSATIONS: EFFECTIVE TACTICS FOR SETTING EXPECTATIONS AND EMPLOYEE ACCOUNTABILITY

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AGENDA

- Introduction
- Expectations
- You
- Your Employees
- Atmosphere, Attitude and Morale – Invisible Forces
- Setting, Communicating and Managing Expectations
- Confronting and Dealing with Poor Performance

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YOU

- **Boss, Supervisor, Leader, Responsible Person but not Buddy**
- **Be Self-Aware**
 - Emotions
 - Reactions
 - Responses
- **Set Self-Expectations**
 - Real, Reasonable and Measurable
- **Be Honest in your Self-Evaluations**
 - Lying to yourself = No Improvement
- **Self-Improvement**

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YOUR EMPLOYEES

- **Recognize that they are all different people and probably different than you**
 - Personalities
 - Priorities
 - Purpose
- **Realize that you do not know what's going on in their lives**
 - Circumstances
 - Concerns
 - Conflicts
- **Respond appropriately – NO MATTER WHAT!**
- **React quickly to issues**
- **Redeem if at all possible**

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YOUR EMPLOYEES

7 Questions	
1. What do you think the TS Role is?	Solving problems and providing solutions for the company's customers, acting in support of the sales force to bring new products to the market/customer or find ways to use existing products that are beneficial to the company and the customer. Being one of the faces of the company in the technical community and helping to ensure that the company is prepared and able to take advantage of opportunities to increase customer satisfaction and sales volumes.
2. What do you think the TS Role should be?	I probably should have read all of the questions first since my answer to #1 is really what I think the role should entail. As a concrete producer, my main concern is what TS can do for me to; solve my technical problems, increase my profitability and help me to differentiate myself from the competitors in my market. I do, however, realize that the role is more than that.
3. What do you bring to the role that's unique/different?	Compared to some others in the technical community, I would like to think that I am significantly more interesting and engaging. With my experience on the technical side as well as the sales side, I can offer the ability to see things from both perspectives.
4. What aspect of the position will be the most difficult?	I suspect that prioritizing and time-management will be the most challenging parts of the position. It seems to be a large area to cover and there are undoubtedly a lot of issues as well as opportunities that arise.
5. How would others describe your bedside manner when dealing with customers and their problems?	Hopefully they would see me as someone who looks at both sides of the issue and takes the time to consider all, or as many as time allows, of the facts before beginning a discussion about a problem and that I am concerned about a fair and equitable outcome but that my responsibility to my company comes first.
6. What is your greatest strength?	That I take time to think through all the available options in order to develop a solution or an answer to a problem or other opportunity.

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ATMOSPHERE


Culture, Environment and Atmosphere = Is it a "good" place to work?

- **Put the right people in the right roles and give them the right tools to meet reasonable expectations**
- **Have clear expectations**
- **Take time to explain**
- **Everything is a team effort and every team member is important**
- **We "pass or fail" as a team but we are individually responsible for our performance**
- **Open communication and collaboration is essential**

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WHY DO PEOPLE DISAPPOINT MEI?

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ATTITUDES

- You can only control one attitude - yours
- You can **influence** employees attitudes
- Don't complain
- Do not talk about one of your employees to another employee
- Always end with a positive
- Decide to be a positive influence
- Fake it till you make it


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MORALE

Employee satisfaction, how the employee feels

- Praise for a job well done
- Recognition for team and individual accomplishment
- "We did it and you were a big part of it"
- "I didn't meet expectations"
- Sorry seems to be the hardest word...
- "Yes, that's a great idea, let's try it"
- Be an encouragement

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EXPECTATIONS

Job Description
Formal Onboarding Process
Necessary
Clear & Concise

- As much detail as needed
- Remove ambiguity
- Use pictures
- No colloquialisms

Measurable

- Comparable
- Number based
- Time based


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EXPECTATIONS

Explainable (Why)
Written
Team and Individual
Flexible
Expectations are not goals

- The goal is to meet the expectations!


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COMMUNICATION

The single biggest problem in communication is the illusion that it has taken place.

– George Bernard Shaw

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COMMUNICATING EXPECTATIONS

- **Team Meetings**
- Share your vision and goals for the team
- **One on one**
- Ask 3 times
- Read the body language (Dangerous)
- **Review what is written**
- **Agreement and Commitment**
- **Check in and provide feedback**
- Day one
- **Adjust quickly**
- Are the expectations unreasonable
- You may expect more over time
- **Ask questions**



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COMMUNICATION "DON'TS"

Assume

- Knowledge
- Ability
- Understanding

Argue

- Expectation setting are yours to set
- Discuss and Decide


Accelerate

- Putting an unprepared employee in a role
- Shortening the training required

Avoid

- Difficult employees
- Difficult Situations
- Owning your mistakes

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MANAGING EXPECTATIONS

Manage Up

- Push back on unrealistic or unnecessary expectations
- Communicate the root cause for unmet expectations
- Communicate the plan for meeting expectations
- Use "we" not "they" in communications
- Communicate any individual employee plans for improvement

Make sure the expectations are attainable with the available tools, time and equipment


Be Consistent

Manage your "expectation scale"

- New employees
- Previous experience

Anticipate Problems

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ANNUAL PERFORMANCE REVIEWS

I hate them

- Keep notes throughout the year
- Review the annual review quarterly

Only having performance reviews once a year doesn't work

- "See something, Say something"
- Good and Bad


Performance reviews like expectations and goals must have clear guidelines

Using the same "form" for every role doesn't work

Feedback and evaluations must be actionable

"Fuzzy" evaluations are meaningless

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LEADERSHIP REVIEW

Separate reality and perception

- I think I'm a great communicator

Helps to get the team on the same page

- Engagement

Reveals areas for improvement


- A great opportunity to set an example

Often reveals communication issues or communication style issues

Builds trust

Encourages employees to improve

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360 REVIEW

Feedback from all viewpoints


Used successfully to reveal strengths and weaknesses

Can be a great tool for any level

Need to be anonymous

Sort out conflicts


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DEALING WITH PERFORMANCE ISSUES

Houston, we've had a problem


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DEFINITIONS

Crucial Conversations - Holding a discussion between two or more people where (1) stakes are high, (2) opinions vary, and (3) emotions run strong, seeking successful resolution and action through respectful dialogue.


Crucial Confrontation - Holding someone accountable for broken promises, violated expectations, or bad behavior through candid and respectful dialogue in a way that problems are resolved, performance improves, and relationships benefit.

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CONFLICT

1. to come into collision or disagreement; be contradictory, at variance, or in opposition; clash.
2. to fight or contend; do battle.
3. a fight, battle, or struggle, esp. a prolonged struggle; strife.
4. controversy; quarrel; conflicts between parties.
5. discord of action, feeling, or effect; antagonism or opposition, as of interests or principles; a conflict of ideas.
6. a striking together; collision.

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STYLES


Competitive: Often used by people with power, rank, position, or expertise.

Collaborative: Used by people trying to meet the needs of all. They cooperate effectively and bring viewpoints together.

Compromising: Used by people who want to at least partially satisfy everyone

Accommodating: Used by people willing to meet the needs of others at the expense of their own needs.


Avoiding: Used by people who seek to evade the conflict entirely. They often delegate and accept ineffective decisions. This approach is usually ineffective.

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EXAMPLES

- Behaviors
 - Tardiness
 - Absent w/o notification
 - Treatment of others
 - Attitude
- Performance Slippage
- Performance Failure
- Insubordination
- Annual Review
- Compensation

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CONFLICT RESOLUTION STRATEGIES


Deal with it Ignore it

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CONFLICT RESOLUTION


Acknowledge that there is a problem

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BE PREPARED

- Have confidence that you have something important to say, know the facts
- Have humility: You may not have the whole picture but can add something to the picture
- Be skillful: Seek coaching so that you can rehearse what needs to be said in the right way
 - Talk to someone who knows the person well**
- Be empathetic
- What outcome are you looking for?
- Will you settle for another outcome?


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OUR BRAIN WHEN WE ARE NOT PREPARED




“Fight or Flight” syndrome leaves us to deal with the most complex and challenging conversations of our lives with the same set of skills we’d use to deal with a salivating predator.

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SET UP THE MEETING


- Choose a private location
- Have only the necessary parties there (No Spectators)
- Have a clear agenda
- Have a clear purpose

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KNOW YOUR EMPLOYEE

- Other work issues
- Family problems
- Likes & Dislikes
- How do they typically start conversations
- How do they react to “criticism”

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GETTING STARTED

Make sure that good relationships are maintained: As far as possible, make sure that you treat the other calmly and that you try to build mutual respect. Do your best to be courteous to one-another and remain constructive under pressure;

Keep people and problems separate: Recognize that in many cases the other person is not just "being difficult" – real and valid differences can lie behind conflicting positions. By separating the problem from the person, real issues can be debated without damaging working relationships;

Pay attention to the interests that are being presented: By listening carefully you'll most-likely understand why the person is adopting his or her position;

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GETTING STARTED

Listen first; talk second: To solve a problem effectively you have to understand where the other person is coming from before stating your own position;

Set out the "Facts": Agree and establish the objective, observable elements that will have an impact on the decision; and

Explore options together: Be open to the idea that a third position may exist, and that you can get to this idea jointly.

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GET THE CONVERSATION STARTED

- Ask questions to get things rolling
- Confirm answers
- Paraphrase to acknowledge the story
- Prime when you are getting nowhere, conversation stalls
- Write what you are hearing for better understanding

Understanding a position does not mean you are in agreement.

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DISCUSSION

Just because you're talking it doesn't mean you're having the right conversation!

- Redirect the conversation if needed
- Avoid distractions, including phone calls, text and emails
- Don't be surprised
- Look at "both sides" of the facts

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SELF AWARENESS

- Be aware of your attitude – Physical and Mental
- Be aware of the impact of what you are saying has on your employee
- Be aware of the impact on you of what the employee is saying
- Know when it's time to end the meeting
- Know how to end the meeting

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DISCUSSION

- Keep emotion out of your discussion
- Avoid arguing to make your argument
- Don't hide or make someone else the bad guy
- Use "I/We" not "you"
- Avoid emphasis on certain words
- It needs to be a win/win not win/lose
- Capture the solution or resolution and next steps and review with the employee

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RESOLUTION

You and the employee agree that there is a performance problem and you develop an improvement plan

You and the employee disagree and you still develop an improvement plan without employee input

You and the employee agree that the expectations are unrealistic

You and the employee agree that the job isn't right for him and find him a different role


You decide that termination is the only solution

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Practice

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Questions

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