



CONVERSATION GUIDE FOR MANAGERS AND SUPERVISORS
PERFORMANCE AND DEVELOPMENT

Conversation Guide:

Performance development conversations are learning conversations with the particular intent of helping an employee to enrich their existing job, advance their career and expand their capabilities and impact within the organization. Thoughtful, ongoing, conversations also build trust, enhance employee wellbeing, and increase the effectiveness of working relationships between managers and employees. In conversations about performance, both the manager and the employee can identify areas for growth, suggest goals, and consider approaches to achieve those goals.

Performance conversations also provide a great opportunity to discuss psychological health and safety in the workplace, encouraging personal action on wellbeing related goals, and linking to broader organizational wellbeing objectives. Mental and physical wellbeing has a direct impact on an employee's performance. Managers and supervisors have are key to enabling wellbeing of team members and in workplaces through walking the talk and fostering a culture supportive of employee wellbeing. Factors like openness, transparency, demonstrating compassion and respect, recognition, and the genuine valuing of others and of their contributions are key to healthy workplaces.

However, it is important to note that employees need to know the organization and their manager supports them to take personal action to support their wellbeing. Focusing on faculty, department or unit level goals, ensuring leaders are "walking the talk", and fostering a culture supportive of employee wellbeing is an important initial step before asking employees to make individual goals.

Guiding principles for a mutual learning conversation are offered along with a 3-step conversation guide to help prepare and facilitate the conversation that includes opening statements and supporting questions.

Guiding Principles for a Mutual Learning Conversation

Coach Approach - Implies entering into a conversation with a curious and open mind, using active listening and open-ended questions that fully explore a person's interests, ideas, beliefs, insights, aspirations, perspectives, challenges, etc.

Asset/Strength Based - Implies looking for and building on a person's existing strengths and talents and taking a keen interest in their perspectives and approaches to work and life.

Mutual Learning and Discovery - Implies that you both have much to learn about/from each other, the work, future opportunities, your working relationship, and the best way to achieve success.

Step 1: Meeting Preparation

Before booking your meeting, check to ensure you both have sufficient time. The optimum length is 90 minutes. And your patience will allow the conversation to unfold more naturally. Ensure privacy and think about structuring the meeting in a way that maximizes trust and [psychological safety](#). Confirm the level of confidentiality that the team member can expect and do your best to select an environment that promotes open dialogue. Performance conversations are mutual learning conversations. Ask yourself if you have any assumptions or beliefs about the person that might get in the way and do your best to suspend them.

Ask the team member to think about their development goals, including a personal related wellbeing goal prior to the meeting. Ensure the employee knows that they won't be evaluated on their personal wellbeing-related objective, and that it is an approach to encourage them to prioritize their wellbeing amongst other performance related objectives.

As a manager and supervisor, consider creating an individual performance objective that supports your own wellbeing and that of your team. Share your performance objectives with your team members during or before the performance conversation to demonstrate its importance in the workplace and ensuring organizational alignment. Your department's WES results, if available, can provide inspiration for your wellbeing-related objectives for your team.

Suggested Statements to Support the Meeting Request.

Your satisfaction, wellbeing, growth and development are important to me and I am interested in sharing some of my observations about your strengths and the positive impact you are having.

I want to understand what you have been enjoying about your work and what is important to you.

We don't get a chance to talk much about what your aspirations are and I am hoping to learn more about that today.

Supporting Questions:

- When would be a good time?
- Where would you like to meet that will ensure we can have a focused conversation?
- What do you need to feel prepared for the conversation?
- What expectations might you have of me to ensure this conversation is valuable to you?
- Based on the time we have I want to propose the following agenda, is there anything else that you would like to include?

Step 2: The Meeting- *Connect, Explore, Close* with next steps

Take time to **connect**, thank your team member for coming, reiterate why conversations such as this are important and how they contribute to a culture of learning, collaboration and leadership excellence. Build rapport by asking them how they are doing (personally and professionally) and what else they might need to get started. Offer them the gift of your full and undivided attention. Review the purpose of the meeting and walk through the agenda.

Suggested Opening Statements

I have booked this meeting to discuss and explore your career goals and development opportunities.

I want to share some specific appreciations with you about what I see as your strengths in this work.

I am looking forward to having an open conversation and learning more about your aspirations, how would you like to get started?

Supporting Questions

- How are you?
- Is this still a good time?
- Is there anything you need to attend to before we get started?
- I want to remind you about my commitment to confidentiality.

Once the purpose has been restated and the connection has been made, take time to **explore** your employee's perspective.

Suggested Statements to Support the Exploration.

I really want to understand what you have been enjoying about your work and what is important to you.

I am interested in sharing some of my observations about your strengths and the positive impact you are having.

We don't get a chance to talk much about what your aspirations are and I am hoping to learn more about that today.

Supporting Questions

- What do you most enjoy about your work?
- What was a peak experience for you over the past year? Why?
- Is there anything you would like to talk about that is positively or negatively affecting your wellbeing in the workplace?
- Which elements of your current role are most intriguing to you?
- Which of your strengths are you getting to use the most of in your current role?
- What do you wish you could do more of / less of?
- What are you finding most challenging?
- What potential solutions would diminish those challenges?
- What, if anything, has been a stretch opportunity for you?
- What is missing for you that would bring new energy or strengthen your engagement in your work?
- What thoughts have you had about your future growth and career?
- What skills and special knowledge do you most enjoy using or learning?
- What type(s) of assignment would you be interested in taking on to broaden your learning and experience?
- What support do you need from me and/or the University to develop your education, experience, knowledge and skills?

As the conversation comes to a **close**, you want to ensure mutual understanding about key take-aways, next steps and individual and shared commitments.

Suggested Statements to Support the Close.

We are just about to wrap up and I want to be sure we are both clear on the takeaways.

Here is what I have heard and want to commit to going forward.

I want to be sure we wrap up this conversation with clear agreements about next steps and my role in supporting your ongoing development as a leader.

Supporting Questions

- What aspect of our conversation today has been of most value to you?
- What stood out as most important in this conversation?
- Thinking about your development goals, how would you prioritize them?
- What would you be most energized to commit to?
- What might get in the way of your growth and development? How might this be managed / overcome?
- How can I support you? What do you need from me?
- Would you like support to complete a development/learning plan?

- What one thing can you do to better support your wellbeing at work?

Step 3: After the Meeting and Next Steps

It is important for both you and the candidate to take time to digest and reflect on the conversation, capture important notes, and schedule regular follow-up sessions to keep the momentum going. Be sure to arrange your next meeting and check in on regular intervals to ensure there is plenty of ongoing dialogue and support.

If you have questions about the conversation guide or have feedback for improvements, please contact:

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