

7 Step Feedback Frame

Now and then we need to pull an employee or colleague aside and talk about performance. Here's how to do it with respect and effectiveness, which keeping everyone in their Smart State! First:

- You can use the below framework in any challenging situation: deep feedback around a conflict or misunderstanding, or for a full counseling/turnaround scenario.
- If a counseling/turnaround period is required:
 - Determine what it should be: 30, 60 or 90 days, depending on the complexity of the behavior change.
 - Next, think through the specific behavior(s) you need changed, as well as what level of support you are willing to provide.
 - Last, determine the consequences if the behavior does not change (Demotion? Termination?) or if the behavior does indeed change (Keep current job? Move to another team? Get back on partner track?)
 - Good—now schedule the meeting with the employee/colleague that needs counseling.

Our clients love our process below, as it helps everyone get to a shared positive understanding for growth/resolution:

1. *Set the stage* – explain why you're meeting and the outcome you want (to form a collaborative turnaround plan).
2. *State observable data/behavior* – this is where you describe specific behaviors that must change and examples so the employee can “step into” the past scenarios.
3. *Describe impact* – the damage that these behaviors are doing to others/the company/the employee themselves.
4. *Check problem acknowledgement* – do they agree that there is a problem? Do they agree this problem now must end? This is the most essential step. If you don't reach agreement here, go back to step 1. Once agreement is reached you'll notice steps 5-7 are more pleasant, as the employee will now be engaged in finding a solution!

5. *Co-create a plan* – set a time period (30-90 days) where you'll meet weekly for 15-30 minutes to track their progress on releasing the challenging behaviors identified above. Make the plan very specific in terms of what you need to see and when you'll know you got the outcome you wanted. If the turnaround doesn't occur, state clearly what the consequences will be (lose job, etc.).
6. *Check understanding* – Is everything clear? Anything else we need to cover? Reiterate desire for a positive resolution so the consequences can become irrelevant.
7. *Build small agreements* – launch the plan and commit to ending the conflict once and for all. Be sure to track it frequently and make sure all concerned see the behavior change too. Some of our clients like to have the employee sign off on the above to ensure this info gets in the Talent/HR files (and the employee takes this change effort seriously).

Here are some examples:

Patty's Plan

What needs to change:

- 1 - Show up on time to all meetings/phone calls/appointments
- 2 - Be fully present/pay attention
- 3 - No interrupting, be respectful and understand your role
- 4 - No defending—collaborate, work with others

If rapid change doesn't occur within first 30 days her role will be changed to a non-executive role and her compensation will be reduced.

How we'll monitor it:

Weekly progress report due each Sunday by midnight (or sooner)—stating progress in all 4 areas and what specifically you have changed/what you are implementing to make change permanent. Leadership will also check in with Patty's colleagues to ensure they experience the change too. 30 day plan.

The terms above were provided in written format and it was stressed that she understands what is needed and what is at stake.

Max's Plan

What needs to change:

- 1 - Listen to and consider other points of view
- 2 - One person speaks at a time—NO interrupting. If unclear, ask if the person is done talking.
- 3 - We're a unified front with a unified goal. We always have each other's back. Period.

How we'll measure it:

Weekly monitoring and discussion.

How will you know when you have it:

- 1 - Max's actions will now put the company's interests first and not his own, he'll be less concerned with title and position and reporting structure
- 2 - Peers will no longer complain about his interrupting them
- 3 - Max will talk less and listen more