

PREPARATION

Once you've decided you must deliver performance feedback it's important to prepare for the conversation by determining what you want for yourself and the other person. Get clear on your intention for the meeting.

Prepare an outline for yourself to clarify your thoughts:

- With who?
- Why do you want to have it?
- What do you want to get out of this conversation?
- What do you want for the other person?
- What are your key messages?

Briefly explain what you want to speak about in advance so they can come prepared mentally and emotionally. Start with:

- "I would like to provide you with feedback" or
- "I have something I need to discuss with you."

When everyone is prepared for the discussion and no one is caught off guard, it allows for participation from both parties.

Follow these tips when planning the meeting time and space:

- Ensure the setting and timing for the meeting will provide an atmosphere of privacy.
- Determine the best time to have the conversation. Try to do it as close to when the behaviour happened as possible, but make sure you are both in a good frame of mind.
- Agree on a mutual time and meet in a place that isn't intimidating for the other person. If meeting in your office, don't sit behind the desk. Come around to the same side as the individual.
- Don't catch the person off guard. If the feedback must be in the moment, ask them to step into a private space with you, away from others and distractions.
- Ensure you are in a focused mindset, free of judgment and assumptions. Consider how you may have played a role in the behavior or contributed to the situation.

THE CONVERSATION

Follow these steps and tips for a successful performance conversation:

- Thank or acknowledge the person for meeting with you.
- Tell them you have feedback for them and ask what they need from you to hear it.
- Listen. Resist the urge to do all the talking. Listen with focus and attention fully on the speaker, their words, body language, and what's behind the words.
- Deliver feedback with specific examples of their behaviour and the impact of the behavior, followed by silence so it lands. For example:
"You may not be aware, but Mrs. Smith was very upset about the care you provided her husband last week. She complained to me that you were rude, demeaning, and insensitive to her when she questioned you about a procedure you wished to perform on him. She said you told her she couldn't possibly understand as it was way above her comprehension level."
- Pay attention to their reactions to the feedback and ask them to clarify. "What did you hear me say?" Ask them for their perspective on the feedback.
- Notice if they are becoming reactive, defensive, or dismissive. Prepare for this by maintaining a calm presence. Do not become judgmental, reactive, or defensive. Remain focused on the facts, and be open to their concerns and needs.
- It's important to acknowledge their feelings. Say things like:
*"I know this is difficult to hear",
"I can see you are upset by this", or
"It's hard to hear feedback that we don't agree with."*
Remember, you've had time to think about this and prepare, but they have not and are only hearing it for the first time. They may need time to process and think about it.
- Determine actions for next steps and/or performance goals going forward. Make suggestions for improvement. These suggestions may come from both parties once there is acknowledgement of the feedback. Be clear about what will be different going forward. Agree to timelines for improvement with a plan to check in and assess the behaviour change
- Thank the person. Acknowledge that negative feedback can be difficult to hear but that it's important to provide so that the individual may understand their impact on others and improve.

POST-CONVERSATION

Each performance conversation is a chance to reflect, learn, and improve. Consider the following:

- Reflect on what went well and what you would change or do over in the future.
- Make sure to follow-up with the individual to ensure they are okay, if required.
- Set time for another formal meeting to discuss performance and ensure they are making the proper steps forward.