

CONVERSATION PLANNER

Employee Name:

Discussion Topic:

Manager Name:

Date:

STEP 1: PREPARE

What are my objectives for this conversation? What do I need to achieve from this meeting?

How will I know I've accomplished these objectives?

What personal needs of the person/team do I need to consider? How would I like the other person to go away feeling?

CONVERSATION PLANNER

STEP 2: PLAN

OPEN THE CONVERSATION		
How will you open the conversation?		
COMMUNICATE THE NEED		
What message do you need to get across?	What evidence-based facts do you have to support your message?	
ANTICIPATE REACTIONS AND RESPONSES		
Their reactions: 1. 2. 3.	Your responses: 1. 2. 3.	
AGREEMENT		
What are the next steps?	What is the timing for each step?	Who is responsible for each step?
CLOSING THE CONVERSATION		
How will you close the conversation? What commitments should be re-stated?		

CONVERSATION PLANNER

STEP 3: REFLECT

What worked well in this conversation?

How could this conversation have been more effective?

DEALING WITH DIFFERENT RESPONSES

BEHAVIOR	STRATEGIES
Person passively agrees to everything you say or decide	<ul style="list-style-type: none"> ▪ Ensure that they do some of their own thinking; question them on their thoughts, rationale, or feelings ▪ Ask them for their own conclusions ▪ Don't be afraid of silence, give time to think ▪ Actively seek and constructively include their comments
Person disagrees with evidence	<ul style="list-style-type: none"> ▪ Ask for their reasons ▪ Listen with an open mind ▪ Acknowledge their right to a viewpoint ▪ Be determined about your facts and restate your decision
Person defends, blames or attacks	<ul style="list-style-type: none"> ▪ Don't defend, blame or attack in return ▪ Use "I" statements, not "you" statements e.g. "I have noticed that you often interrupt colleagues when you disagree." Rather than: "You need to be more professional." ▪ Don't argue or try to prove that your point of view is correct ▪ Restate the objective of the conversation ▪ Don't dismiss complaints but agree to discuss their implications at another time
Person gets emotional and/or cries	<ul style="list-style-type: none"> ▪ Acknowledge this is a challenging conversation ▪ Give them a minute to compose themselves before moving on
Person is impatient or tries to side-track the meeting	<ul style="list-style-type: none"> ▪ Clarify the agenda for the meeting ▪ Listen and note points to address later without getting side-tracked yourself ▪ Make a firm commitment to discuss the priority issue for the individual at a later date
Person talks too much	<ul style="list-style-type: none"> ▪ Don't respond too quickly – give them time to talk ▪ Restate the purpose of the meeting and the agenda ▪ Keep them to the agenda by referring to what they've said and asking relevant questions ▪ Narrow down choices and focus them
Red-flag words (e.g. bullying, discrimination, harassment)	Pause the conversation: "That's a serious word and WVU is committed to a positive work environment for everyone. Can you help me understand what you mean?"

EXAMPLE CONVERSATION PLANNER

Employee Name: John Smith

Manager Name: Sarah Jones

Discussion Topic: Time management and missing deadlines

Date: 8/10/24

STEP 1: PREPARE

What are my objectives for this conversation? What do I need to achieve from this meeting?

To find out why John continues to miss project deadlines, make sure he understands the larger consequences to the team when he misses deadlines, and make a plan for the best way to proceed.

I also want to determine if John has everything he needs to succeed and meet his deadlines, and whether there's anything I can do to help him.

How will I know I've accomplished these objectives?

By finding out why John has been missing deadlines, and creating a plan on the best way forward that we both agree upon.

What personal needs of the person/team do I need to consider? How would I like the other person to go away feeling?

John is still in his first 6 months with the department and is learning. I want him to go away feeling supported and encouraged, while also understanding the role he plays in the larger success of the team.

I'd like to see if John can help come up with the solution so he feels ownership of this situation.

EXAMPLE CONVERSATION PLANNER

STEP 2: PLAN

OPEN THE CONVERSATION		
<p>How will you open the conversation?</p> <p><i>Your role is really important to the overall success of the team. How do you think you're doing with getting the monthly metrics report done on time? Your recent missed deadlines have impacted the team's ability to deliver on time. I want to discuss how I can best support you so that you're set-up for success. Is there anything that's been preventing you from completing your reports on time?</i></p>		
COMMUNICATE THE NEED		
<p>What message do you need to get across?</p> <p><i>Missed deadlines have a domino effect and impact operations and the team's ability to deliver on time.</i></p>	<p>What evidence-based facts do you have to support your message?</p> <p><i>There's been a pattern of missed deadlines</i></p> <p><i>Three out of the last four months the metrics report has been turned in late</i></p>	
ANTICIPATE REACTIONS AND RESPONSES		
<p>Their reactions:</p> <ol style="list-style-type: none"> <i>Question why being a couple of days late is a big deal.</i> <i>Make invalid excuses for why the reports were late.</i> <i>Might not have realized he missed the deadlines.</i> 	<p>Your responses:</p> <ol style="list-style-type: none"> <i>Explain the operational reasons that deadlines are critical.</i> <i>Explore excuses, but directly address the invalid ones and search for solutions for any reasons that are valid.</i> <i>Refer to initial training and the project calendar.</i> 	
AGREEMENT		
<p>What are the next steps?</p> <p><i>Develop a solution that will equip John to better manage his time, allowing more space in his schedule to focus on completing the monthly metrics reports.</i></p> <p><i>Schedule weekly check-ins to ensure John is on track</i></p>	<p>What is the timing for each step?</p> <p><i>30 days to implement changes</i></p> <p><i>Weekly check-ins for the next 90 days</i></p>	<p>Who is responsible for each step?</p> <p><i>John and Sarah</i></p> <p><i>Sarah</i></p>
CLOSING THE CONVERSATION		
<p>How will you close the conversation? What commitments should be re-stated?</p> <p><i>I appreciate your commitment to put this plan in place. Just to confirm, we've agreed on this solution to help you better manage your time and give you more space to focus on the monthly metrics report and I'll be checking in with you each week to see if you need any support. I feel good about this solution and believe it will have a positive impact on both your and the team's success. I encourage you to come to me immediately if you have any concerns, no need to wait for the weekly check-in.</i></p>		