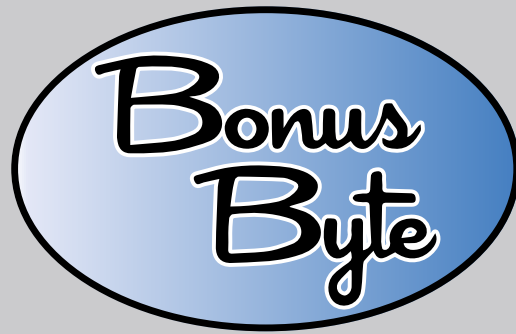


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**Four Ways Performance Management Forms Can  
Create Meaningful Performance Conversations**

# FOUR WAYS PERFORMANCE MANAGEMENT FORMS CAN CREATE MEANINGFUL PERFORMANCE CONVERSATIONS

by Kevin Eikenberry

I'm guessing doing performance evaluations isn't the part of the job you like the most, or if you're new aren't the things you are most excited about!

Among the litany of conversations and complaints I hear from leaders – and individual employees – is that the form used doesn't help the process. While I haven't seen the form your organization uses, I am certain it is a well thought out form that asks important questions and aims to document valuable information. The problem isn't really with the form, it is that people don't know how to use it. Therefore, the form becomes one of the scapegoats for a frustrating and less than effective process of performance coaching.

Repeat after me. *It isn't about the form.* The form is for HR. The purpose of the session for you and your team member is to have a successful and balanced conversation about his/her performance.

Here are some ways you can use the form to create more effective performance discussions.

**Have them fill out a copy.** This may be the most common approach used, and it can be very effective – when done correctly. Do have your team member think about the material on the form; don't have your copy out and go through it as he/she talks about his/her thoughts. You wanted your team member to come prepared, so value what he/she has to say. One way to show you value his/her thinking is to listen instead of looking at your form during the conversation.

**Use it as your agenda.** Make the form a roadmap. Tell people that is what you are going to do, but take the focus off of the form. The more you make the meeting about the conversation, the feedback and the plan for the future, the more of the stigma caused by the form and the process you can remove or reduce.

**Don't use it at all until the end.** Am I saying to forget the form completely? Relax, I'm not saying to start a rebellion and not complete the form. I'm simply saying that the best way to make the process not about the form is to leave the form out of the process. If you are a seasoned leader/coach, you can have your performance conversation and then fill out the form with the other person, almost as an afterthought. If the anxiety about your form is high, this approach might work best for you.

**Craft preparation questions from it.** The approach of having the other person prepare for the meeting is critical. This conversation is about his/her performance after all. You want and need your team member's involvement in and ownership of the conversation. If the form is lengthy or seems complicated or complex to your team members have them prepare without the form, but with a series of questions that you pull from the document or that are developed guided by the document. Giving people a simple set of questions to consider and use in their preparation may be much more effective.

Clearly these aren't all strategies you would use in the same meeting – some can be used in tandem, others are virtually opposites. The point is to have options.

One size doesn't fit all when trying to create meaningful conversations with people. With the use of these ideas, you can create more effective performance conversation with clearer direction and less stress.

# ABOUT BUD TO BOSS

*Bud to Boss* provides new leaders and organizations looking to develop new leaders with insight, resources and powerful learning opportunities designed to specifically address the challenges of successfully transitioning from peer to leader.

To speak with someone about how we can help you or your organization, send a note to **info@BudtoBoss.com** or call the number on this page.

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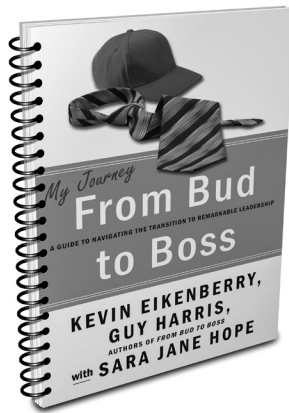


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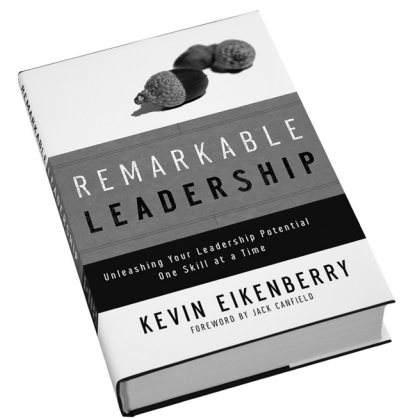


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A companion volume to the From Bud to Boss book, the Journey is a workbook designed to help you apply the knowledge gained to actual work experiences. It includes activities, questions, and exercises designed to take you beyond the concepts introduced to you during the Workshop or the book. And while this book is completely designed to be written in, all of the templates and tools are available in both PDF and Word document form so that you can use them over and over.

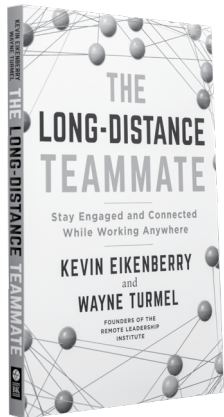
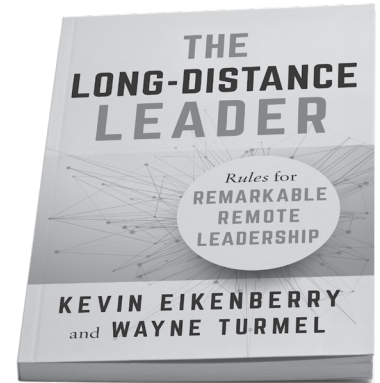
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