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Kylemore Lough
Wild Connemara

FEARLESS REVIEWS

Transforming Performance Reviews into
Fearless Coaching Conversations



With Jeff Russell
Co-Director

OUR LEARNING AGENDA . . .

1. Discuss the characteristics of *fearless* and *fear-inducing* performance reviews.
2. Introduce the ten characteristics of fearless reviews.
3. Identify the seven reasons why reviews often create fear.
4. Introduce the *Collaborative Mindset*.
5. Explore an employee-centered framework for the *Performance Coaching Conversation*.

FEARLESS AND FEAR-INDUCING REVIEWS!

- What makes a performance review a “fearless” review?
- What makes the review a “fear-inducing” one?



TEN CHARACTERISTICS OF FEARLESS REVIEWS

1. Forward looking.
2. More developmental than evaluative.
3. Focused on improvement in performance behaviors and outcomes.
4. Anchored to “Great Performance” outcomes and goals that are defined early in the performance cycle.

TEN CHARACTERISTICS . . .

5. Employee-centered. The employee takes the lead role in the process.
6. Frequent – conducted as often as necessary to keep performance on track and getting it back on track if and when problems occur.
7. Conversational and informal leading to a shared understanding.

TEN CHARACTERISTICS . . .

8. Based upon a Collaborative Mindset vs. a *My-Way Mindset*.
9. Objective and data-based – using observable and countable behaviors and results as its foundation.
10. Meaningful . . . both the employee and the coach have learned something about themselves and each other.

SEVEN REASONS FOR FEARFUL REVIEWS

1. It feels as though there is a lot at stake.
2. The process feels overly judgmental.
3. The process sometimes raises uncomfortable truths.
4. People may feel “blamed” for a problem.
5. People aren't skilled at it.
6. There's too much uncertainty.
7. People feel a loss of control.

A MINDSET CONTINUUM

My-Way Mindset

*I am right, you
are wrong.*

*I'm in charge,
you're not.*

*My version of
the truth is the
right one.*

*I need to win,
you need to
lose.*



Collaborative Mindset

*I have
something to
learn.*

*People are
doing their
best.*

*I only know
part of the
story.*

*We both can
win.*

When approaching a performance review,
both the supervisor and employee always *choose* a
position on this Mindset Continuum.

Where are you managers along this scale?
Where do your frontline employees fall on this
continuum?

WHEN THINGS DON'T FEEL RIGHT

Which *mindset* do people tend to use:

- when they feel wronged by another party?
- when they are pushed in directions that they don't want to go?
- when they feel attacked or undermined by another party?
- when their mistakes and errors are exposed?
- when they feel blind-sided by another's words or actions?



BUT, WE HAVE A CHOICE!

- We can follow the *My-Way Mindset* and let it lead us toward ineffective and *fear inducing* performance reviews.
- Or . . . We can consciously engage in an alternative approach – the *Collaborative Mindset* – to guide us into effective and *fearless* performance coaching conversations.

COLLABORATIVE MINDSET

- Based on an alternative set of governing values.
- Focuses on understanding and learning.
- Assumes that we know and understand only a part of the puzzle.
- Honors other people's perspective – *especially* when there is disagreement.
- Is more likely to lead to effective relationships and positive results (**and fearless reviews!**).

COLLABORATIVE MINDSET – A WINNING APPROACH

Outcomes

- Better communication and understanding.
- Root causes of challenges and difficulties are identified.
- Stronger and healthier relationships.
- Greater trust.
- Lower interpersonal conflict.
- Greater compassion.
- Better results (e.g., productivity and performance).
- Deeper and more meaningful conversations.
- Collaborative learning.

Behaviors

- Speak honestly.
- Share all information that's pertinent to the situation.
- Identify and test assumptions.
- Suspend judgment.
- Share my reasoning and intent and inquire into others' reasoning, intentions, perspective, knowledge, and experience.
- Listen for understanding.
- Focus on exploring mutual interests, not defending positions.
- Develop shared meaning of key words, concepts, ideas, events, decisions, and actions.
- Share decision making and action planning.
- See the parts; understand the whole.
- Use critical reflection to examine my deeply held beliefs and behavioral patterns.

Assumptions

- I have something to learn from others in this relationship or situation.
- I have information, knowledge, and experience that I bring to every situation—and so do others.
- People are able to make free and informed choices when they receive all relevant information.
- There are many right answers to any problem or challenge.
- Giving up control increases a person's influence.
- Empathy is a bridge to understanding.
- Differences provide opportunities for insight and learning.
- People are simply trying to do the right thing under the circumstances they face.

Values

- Authenticity.
- Actionable information.
- Free choice/informed choice.
- Personal commitment to the choices made.
- Transparency.
- Empathy.
- No one person's truth is absolute.

Outcomes reinforce values, assumptions, and behaviors.

GOVERNING VALUES . . .

- **Authenticity** – Being honest with oneself and others, acting with integrity, demonstrating congruence between one's inner thoughts and external expressions.
- **Actionable Information** – All relevant information is shared so that everyone understands what they need to know and take actions based upon . . .
- **Free Choice/Informed Choice** – People make their independent decisions based upon good information, not due to coercion.
- **Personal Commitment to Choices** – Individuals have greater ownership and take greater responsibility for the choices that they participate in.

GOVERNING VALUES . . .

- **Transparency** – Individuals feel comfortable with open, honest, and direct communication with no “hidden agendas” or undiscussables.
- **Empathy** – Individuals have compassion for others and differing viewpoints and a genuine interest in understanding another’s perspective.
- **No One Person’s Truth is Absolute** – Each person’s truth is a reflection of his or her reality, how he or she perceives the world. Discovering a holistic truth emerges from respecting others’ truths.

THE ENACTING BEHAVIORS

1. Speak honestly.
2. Share all pertinent information.
3. Identify and test assumptions.
4. Suspend judgment.
5. Share your reasoning and intent and inquire into others' reasoning, intentions, perspective, knowledge, and experience.
6. Listen for understanding.

THE ENACTING BEHAVIORS

7. Focus on exploring mutual interests, not defending positions.
8. Develop shared meaning of key words, concepts, ideas, etc.
9. Share decision making and action planning.
10. See the parts, understand the whole.
11. Use critical reflection to examine deeply held beliefs, and behavioral patterns.

FACILITATING A COLLABORATIVE MINDSET

Turn to a neighbor . . .

Transformation – Which Values or Behaviors are likely to have the greatest positive effect upon making performance reviews truly fearless?

1. In Our Managers – How might we develop a Collaborative Mindset in our managers and supervisors to ensure fearless reviews?
2. In Our Employees – How might we develop a Collaborative Mindset in our frontline employees to ensure fearless reviews?

Samish Bay Sunrise, Washington

Quality is impossible if people are afraid
to tell the truth.

— W. Edwards Deming

A **FEARLESS**, EMPLOYEE-CENTERED PROCESS

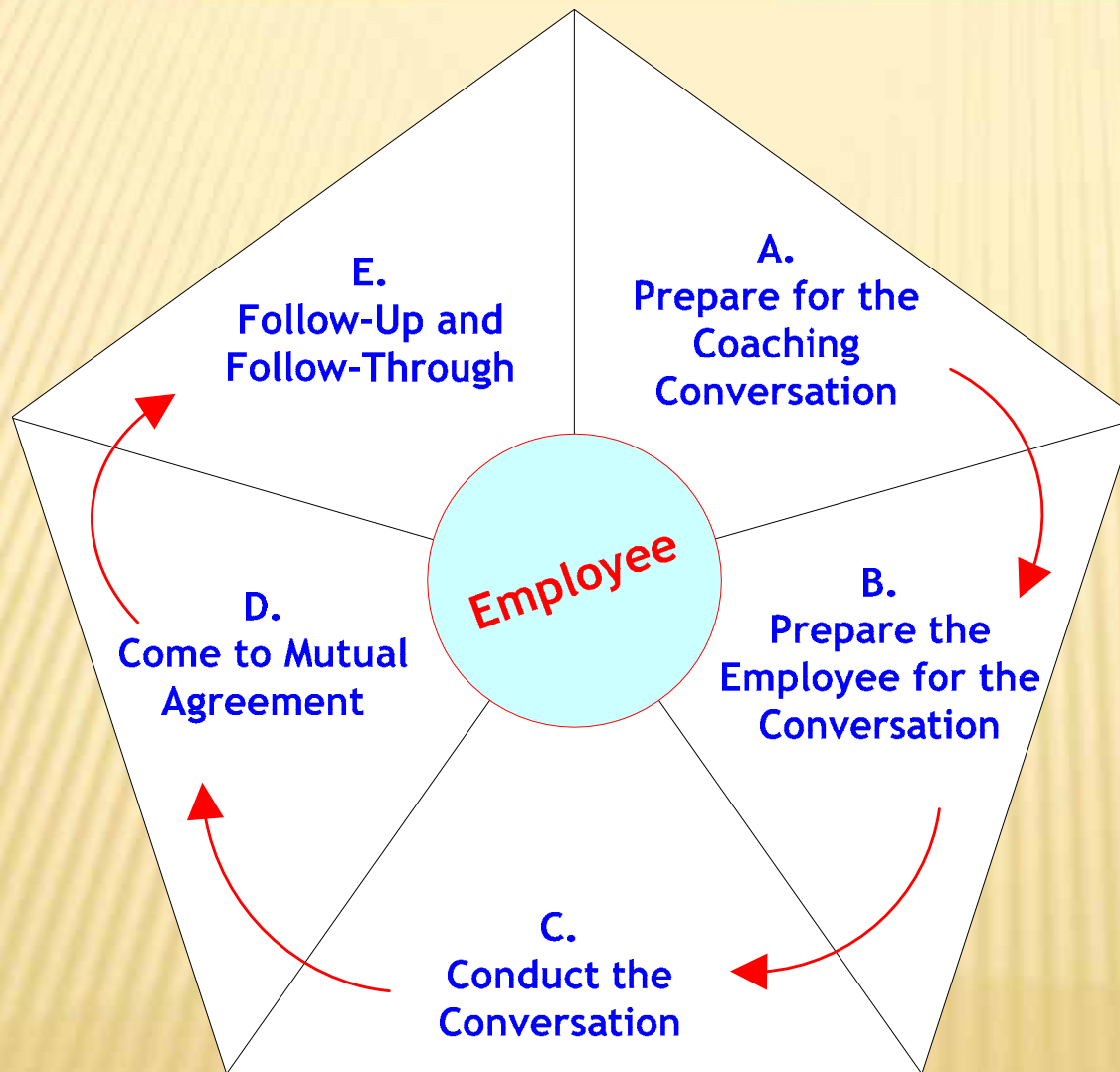
1. Each **employee is responsible** for his her own performance.
2. This includes conducting a **self-assessment** of his or her own performance.
 1. **What's going well in your job?**
 2. **What isn't going well?**
 3. **Why is/isn't it going well?**
 4. **What changes/improvements could you make in your job to enhance your job performance?**
 5. **How can I best help you achieve your performance goals?**
3. The **manager independently conducts his or her own analysis** of the employee's performance.

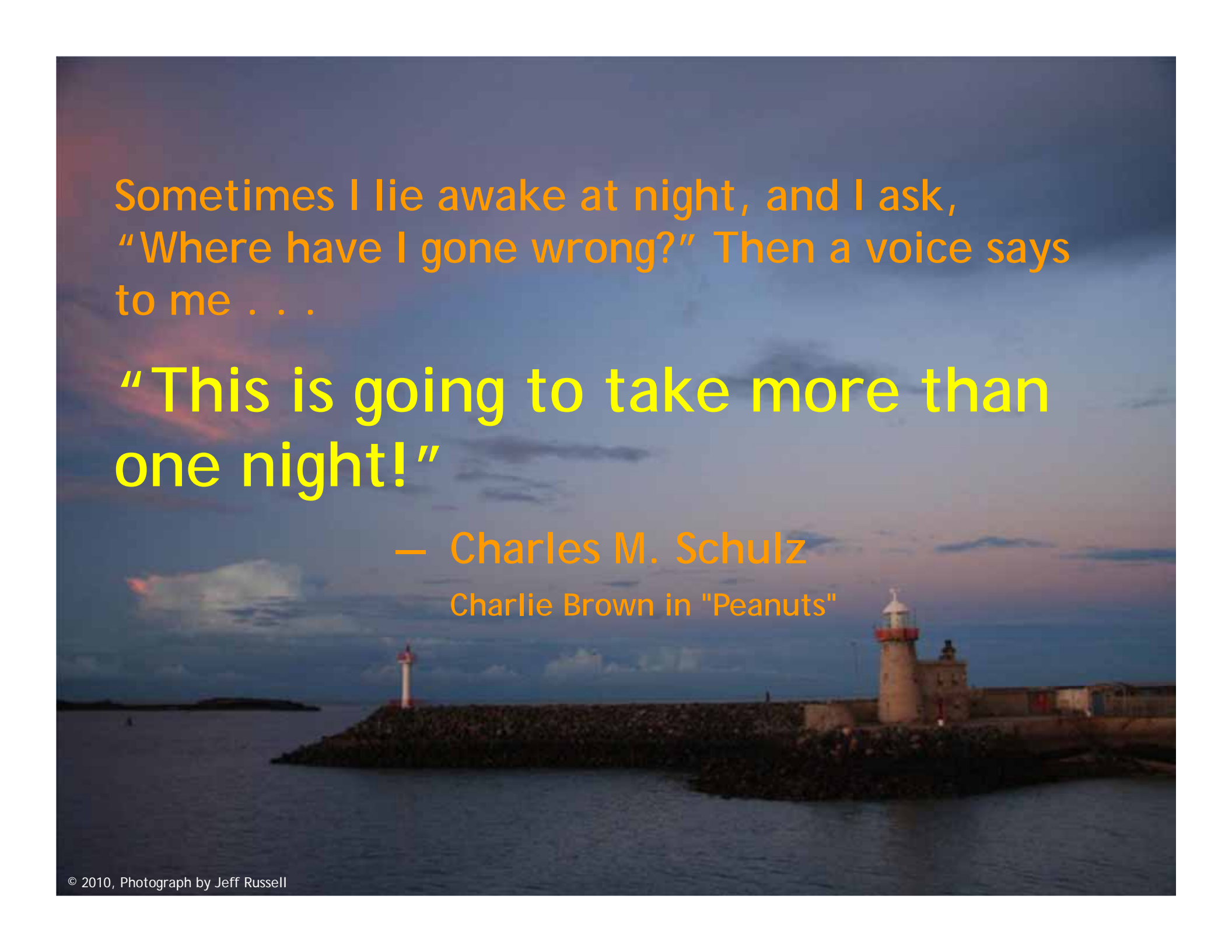
A **FEARLESS**, EMPLOYEE-CENTERED PROCESS

4. The **employee leads the way** in the Performance Coaching Conversation!
5. Manager and employee mutually define a path to performance success.
6. The manager completes the final performance review form **following** the coaching conversation.



THE PERFORMANCE COACHING CONVERSATION





Sometimes I lie awake at night, and I ask,
“Where have I gone wrong?” Then a voice says
to me

“This is going to take more than
one night!”

— Charles M. Schulz
Charlie Brown in "Peanuts"

Lake Minocqua Sunset

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