

Tool #2: Prepare a Watertight Outline for Delivering Difficult Feedback

Overview

This worksheet helps managers give constructive performance feedback. It shows how to pinpoint specific behaviors or actions that an employee needs to change, and demonstrates how to prepare a road map for a clear conversation with an employee.

Intended User

Managers who need to give difficult performance feedback.

Goal

To help you deliver feedback in an objective, thoughtful, and constructive way.

Estimated Time Required

15 to 30 minutes per employee.

Available Online

To access an editable version of the worksheet on page 14, visit advisory.com/hrac/manageraccurateevaluations

1 Collect your thoughts about the situation

Giving constructive performance feedback can be hard. So it's helpful to prepare a clear, simple message in advance. This gives you the chance to think about your main points first and prepare to share your thoughts in a way that the listener will be able to easily understand.

The table below shows a simple message structure for sharing performance feedback. When you need to prepare feedback for an underperforming employee, refer to the table below and fill in your own P-E-C message in the table on page 12.

Performance-Expectation-Consequence (P-E-C) Message Components

| | Think About | Example |
|-----------------------------------|--|---|
| P Is for Performance | What did your employee do that led him or her to fail to meet performance standards? Cite specific examples of actions or behaviors that you observed. | <i>Jorge is a nurse in the cardiovascular unit. Last Tuesday he left work 20 minutes early without explanation. He missed the unit huddle and failed to pass information to nurses on the next shift.</i> |
| E Is for Expectation | What is the standard that you expect your employee to meet? Explain your expectations using examples of the behavior or actions the employee should demonstrate | <i>I expect Jorge to complete his full shift and not leave without explanation. I also expect Jorge to stay for the unit huddle and give detailed information about his patients (including status updates, recent medications, and expected visitors) to nurses on the next shift.</i> |
| C Is for Consequence | What is the consequence of your employee not meeting the standard you expect? Describe how his or her failure to meet standards impacts your team and/or the organization. | <i>Since Jorge left early he did not have time to tell Tania, a nurse from the second shift, that one of his patients had a visitor coming that evening. Tania took the patient to X-ray and he missed his visitor. The patient and his visitor were very unhappy about this.</i> |

Your Performance-Expectation-Consequence (P-E-C) Message

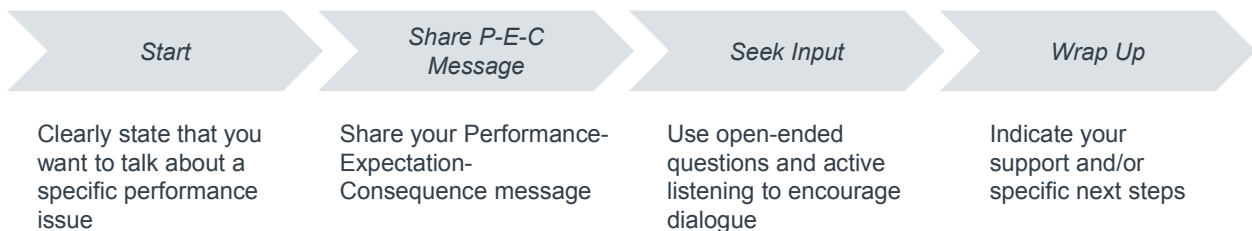
| | |
|--|--|
| <p>P Is for Performance</p> | |
| <p>E Is for Expectation</p> | |
| <p>C Is for Consequence</p> | |

2 Prepare your road map for the conversation

Your P-E-C message contains the heart of the feedback you need to deliver. If you feel comfortable delivering your P-E-C message directly to your employee, you can skip this step. If you want additional guidance on how to structure the entire conversation, keep reading.

Your employee might be caught off guard and react defensively (and ultimately miss your point) if you jump straight to your P-E-C message without easing into the conversation—or if you end too abruptly. An effective, smooth feedback conversation contains the four parts shown below.

Conversation Road Map



Source: Talent Development, *Coaching for Optimal Outcomes*, 2013; HR Advancement Center research and analysis.

The table below shows how the **Performance-Expectation-Consequence Message** and the **Conversation Road Map** come together. It contains sample talking points and scripting to give you ideas for your conversation.

Using this table as a guide, prepare for your conversation with an underperforming employee by filling in the “Scripting Notes” section for **Your Conversation Road Map** on page 14.

Sample Scripting and Examples for the Conversation Road Map

| Road Map | Sample Talking Points | Example |
|----------------------------|---|--|
| Start | <ul style="list-style-type: none"> • I'd like to talk with you about... • I have noticed... • I am concerned about... • I want to discuss... • I have some thoughts about... • I feel I need to let you know... | <p><i>Jorge, I would like to talk with you about when you left work early last Tuesday.</i></p> |
| Share P-E-C Message | <p>P: Cite specific examples of actions or behaviors that you observed.</p> <p>E: Explain your expectations using examples of the behavior or actions the employee should demonstrate.</p> <p>C: Describe how his or her failure to meet standards impacts your team and/or the organization.</p> | <p><i>P: I am concerned about this because you missed the unit huddle, and you didn't let me know that you would be leaving before the end of your shift.</i></p> <p><i>E: I expect you and everyone on our team to complete the full shift. I also expect you to stay for the unit huddle so you can pass along the necessary information about your patients to the next shift.</i></p> <p><i>C: Since you left early and missed the huddle, Tania didn't know that one of your patients had a visitor coming that night. She took the patient down to X-ray and he missed his visitor. The patient gave Tania a hard time when he found out he missed his visitor and his visitor complained to me.</i></p> |
| Seek Input | <ul style="list-style-type: none"> • What is your view of this situation? • What are your thoughts? • Why do you think this happened? • What do you think you can do to improve? • How could you have handled that situation differently? | <p><i>How could you have handled that situation differently, Jorge?</i></p> <p><i>Please tell me your thoughts.</i></p> |
| Wrap Up | <ul style="list-style-type: none"> • I'd like to help you address this issue by... • How can I best support you...? • I expect you to [change the behavior/action]... • Let's meet again [next week, month] to follow up about... | <p><i>I expect you to not miss any more staff huddles or leave a shift early unless you first talk with me about your situation.</i></p> <p><i>Let's meet again next week to discuss how we can both make sure this doesn't happen again.</i></p> |

Source: Talent Development, *Coaching for Optimal Outcomes*, 2013; HR Advancement Center research and analysis

Your Conversation Road Map

| Road Map | Your Scripting Notes |
|----------------------------|----------------------|
| Start | |
| Share P-E-C Message | |
| Seek Input | |
| Wrap Up | |

Source: Talent Development, Coaching for Optimal Outcomes, 2013; HR Advancement Center research and analysis.