Six Steps for Handling Coaching and Feedback Discussions

1. Prepare for your discussion.
   • Establish a time, place and purpose.
   • Obtain a copy of the action plan created for that employee.
   • Evaluate personal observations and request feedback from other sources.
   • Compare and contrast observations with the action plan items. Consider successes and developmental needs.

2. Begin the discussion.
   • Review the purpose of the discussion.

3. Find out what the employee thinks first.
   • Ask the employee to describe their progress to date against the objectives in the action plan.

4. Explain your ideas.
   • Positively reinforce all on-target performance.
   • Where progress against objectives is below expectations, analyze and document causes and impact. Focus on the problem and its consequences.

5. Resolve issues and reach sound conclusions.
   • Ask the employee’s help in solving any issue and discuss your ideas as to how to solve it.
   • If necessary, revise the action plan in accordance with any significant changes, such as organizational or role changes. Use a new action plan sheet to record the updated plan.

6. Develop a specific action plan.
   • Come to an agreement on and write down the steps to be taken by each of you.
   • Encourage the employee toward achievement of the new objectives set.
   • Set a follow-up date.