

ADOPTING A COACHING MINDSET FOR IMPACTFUL QUARTERLY CONVERSATIONS™

MINDSET: "I will be..."



- humble, open, honest, and willing to be vulnerable.
- a role model for what I expect from my team.
- focused on making each other better, not judging, blaming, or shaming.
- tough on issues, easy on people.
- thinking about the most important items I want to address in this conversation.

PREPARATION: "I will..."



- schedule the conversation well in advance.
- select a place off-site, informal, and away from the office.
- use The 5-5-5™ to guide the conversation.
- take notes when appropriate.
- NOT bring forms to the Quarterly Conversation.
- use The People Analyzer™ to prepare for the conversation.

COMMUNICATION: "I will let them know in advance that this..."



- is not a performance review and not going into your file.
- is about improving our relationship.
- keeps expectations of each other crystal clear.
- helps us each get better.
- puts issues in front of us, NOT between us.

THE 5-5-5



**WHAT'S WORKING?
WHAT'S NOT WORKING?**

REFLECT: "How am I doing?"



- How many "bosses" have I developed?
- How many people would credit me for their professional development?
- How would my people rate me as their "boss" on a scale of 1 — 10 (where 10 is Great)?

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STEP 1: WHAT'S WORKING

ASK:

- "What are you most proud of achieving?"
- "Why were you successful?"
- "How did you do it?"
- "Who was most helpful?"
- "What skill or lesson did you learn?"
- "How will you apply your new learning/skill?"

GIVE GENUINE PRAISE:

- **TRUTHFUL:** From personal observation, impactful
- **SPECIFIC:** Provide details: Why, What, How...
- **POSITIVE:** No "buts," "however," or "next time..."

STEP 2: WHAT'S NOT WORKING



- Begin with an attitude of learning, interest, curiosity, and caring.
- Be tough on issues, easy on the person.
- Stay in question versus telling mode.
- Use the 80/20 method.



ASK:

- "What's happening?"
- "Tell me more..."
- "How do you know it's true?"
- "What are the facts?"
- "What do you think is the real issue?"
- "What do you think caused it?"
- "How do you feel about it?"

ANTICIPATE 3 COMMON TYPES OF ISSUES:

- Ones that CANNOT be solved – Listen. They just need to be heard and acknowledged. But ask them if they will let the issue go.
- Ones that YOU must solve – You're the one with the accountability, autonomy, and authority to address it.
- Ones THEY must solve – Push issues to them... especially when they belong to them. You'll help them build their confidence and take responsibility.



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STEP 3: NEXT STEPS

- Focus on what they will do to improve and how they feel you can help.
- Avoid giving unsolicited advice — don't tell them what to do.

ASK:

- "What do you recommend?"
- "What steps will you take?"
- "What resources will you need?"
- "How can I help?"
- "What are you going to do next?"
- "What will happen when you do it?"
- "Do you have a backup plan?"

STEP 4: ACCEPTING FEEDBACK

- Let them finish; don't interrupt.
- Don't be defensive — ask for specific examples. "Tell me more..."
- Use the checklist from The Five Management Practices™.

ASK

- "How do you feel I'm doing as your boss?"
- "Where do you feel I could improve?"
- "What's the ONE THING I should do to improve our relationship?"
- "What's the ONE THING YOU should do to improve our relationship?"