COMPANION PDF

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PERFORMANCE FEEDBACK STRATEGIES

Driving Successful Behavior Change

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ATD Press is an internationally renowned source of insightful and practical information on talent development, training, and professional development.

ATD Press
1640 King Street
Alexandria, VA 22314 USA

Ordering information: Books published by ATD Press can be purchased by visiting ATD's website at td.org/books or by calling 800.628.2783 or 703.683.8100.

Library of Congress Control Number: 2024944239

ISBN-10: 1-957157-86-0
ISBN-13: 978-1-957157-86-3
e-ISBN: 978-1-957157-88-7

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Cover Designer: Faceout Studio, Elisha Zepeda

Printed by BR Printers, San Jose, CA

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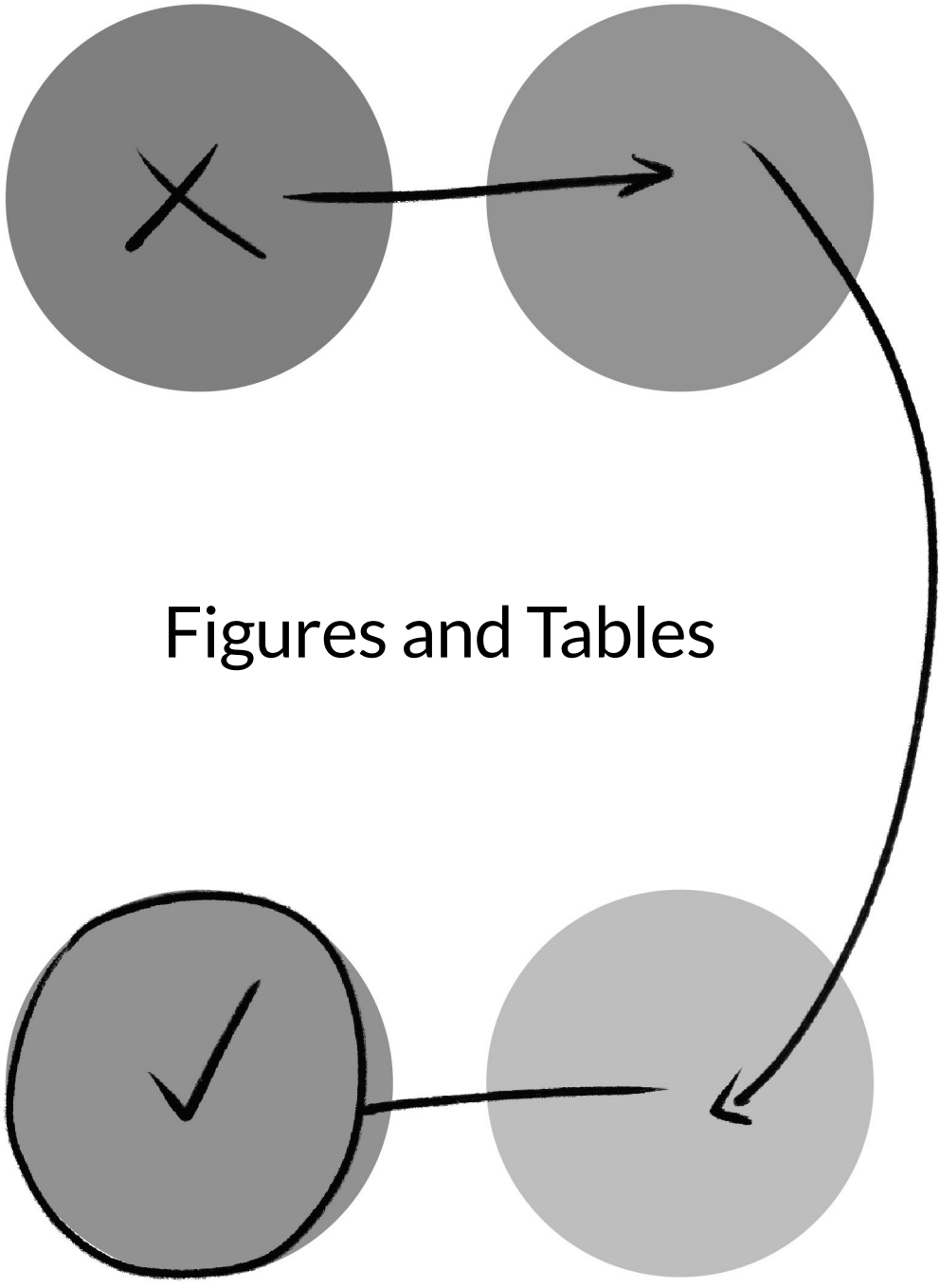
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Figure 1. Employee Engagement Index

For each engagement factor, check the boxes that best describe your employee's current level of engagement. Follow up with those you marked as "low" to discuss further and identify possible underlying factors affecting performance and interpersonal relationships on the job. In some cases, a referral to internal employee assistance counseling or an external allied health professional might be warranted.

Engagement Factor	Low	Moderate	High
Commitment Level			
Commitment to job			
Commitment to team			
Commitment to organization (intent to stay)			
Relationships at Work			
Relationship with the team			
Relationship with customers			
Relationship with your manager			
Affect or Mood			
Overall mental health			
Overall physical health			
Level of energy			
Overall positive self-talk (e.g., confidence or hope)			
Engagement with social situations			
Level of enthusiasm			
Level of positivity			
Work Performance			
Timeliness or responsiveness to others			
Overall productivity			
Presence at scheduled work meetings			
Uncharacteristic behavior			
Cooperation or collaboration with others			
Attention to detail			
Focus or concentration			

Source: Mashihi and Nowack (2013)

Table 1. Feedback Tendencies Across Generations

	Receiving Positive Feedback *Scale: -5 (avoid) to +5 (prefer)*	**Receiving Negative Feedback** *Scale: -5 (avoid) to +5 (prefer)*
Generation Y	1.88	4.18
Generation X	2.38	4.81
Baby Boomers	2.80	6.11

Table 2. Parts of the Brain Activated by Goal Setting

Default Mode Network (DMN): The Will	
Ventromedial prefrontal cortex (vmPFC)	• Daydreaming and rumination • Self-reflection • Introspection • Social and emotional understanding • Emotion regulation (fear and anxiety processing) • Engagement and openness to ideas • Emotional reappraisal • Evaluation of fairness • Intuitive-experiential thinking style
Posterior cingulate cortex	
Ventral striatum	
Nucleus accumbens	
Parasympathetic activation (relaxation response)	

Table 3. Parts of the Brain Activated by Goal Striving

Task-Positive Network and Executive Functioning (TPN): The Way	
Ventrolateral prefrontal cortex (vmPFC)	• Decision making • Problem solving • Judgment • Working memory • Attentional control • Emotional regulation (suppression, distancing, cognitive reappraisal) • Emotional distress or pain • Goal setting or goal striving • Perceptual or analytical thinking style
Dorsal anterior cingulate cortex (dACC)	
Parietal cortex	
Temporoparietal junction (TPJ)	
Sympathetic activation (“fight or flight” response)	

Figure 2. The 3E Model of Successful Individual Behavior Change

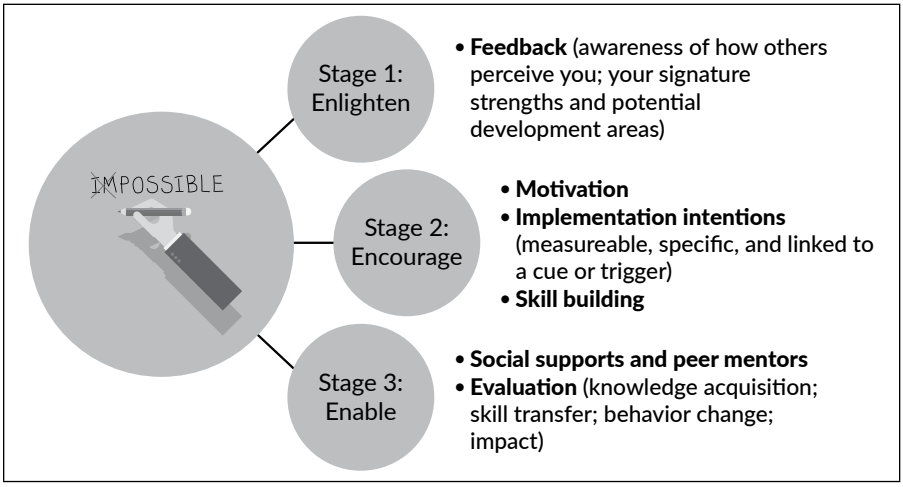


Figure 3. The Four Stages of Developing Habits

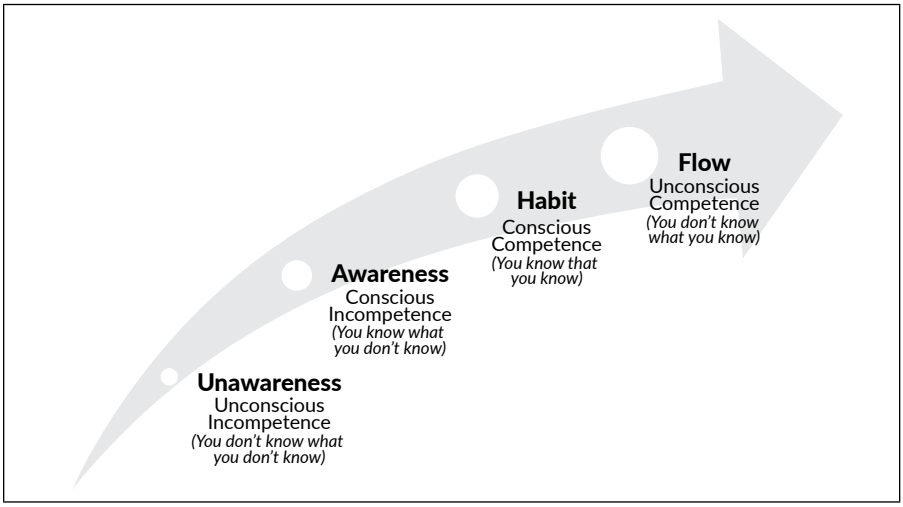


Figure 4. Performance Feedback Coaching Model

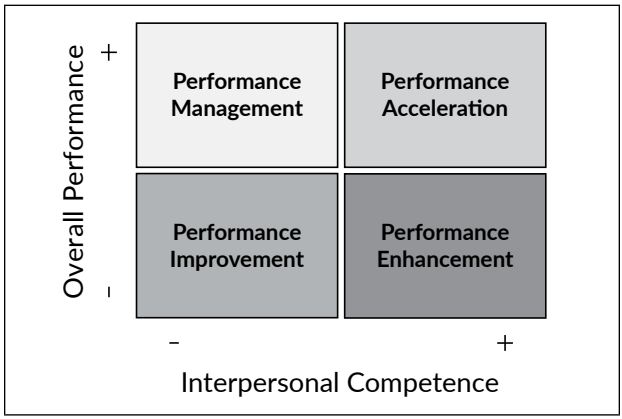


Figure 5. Flowchart: Assessing Knowledge and Skill Deficiencies

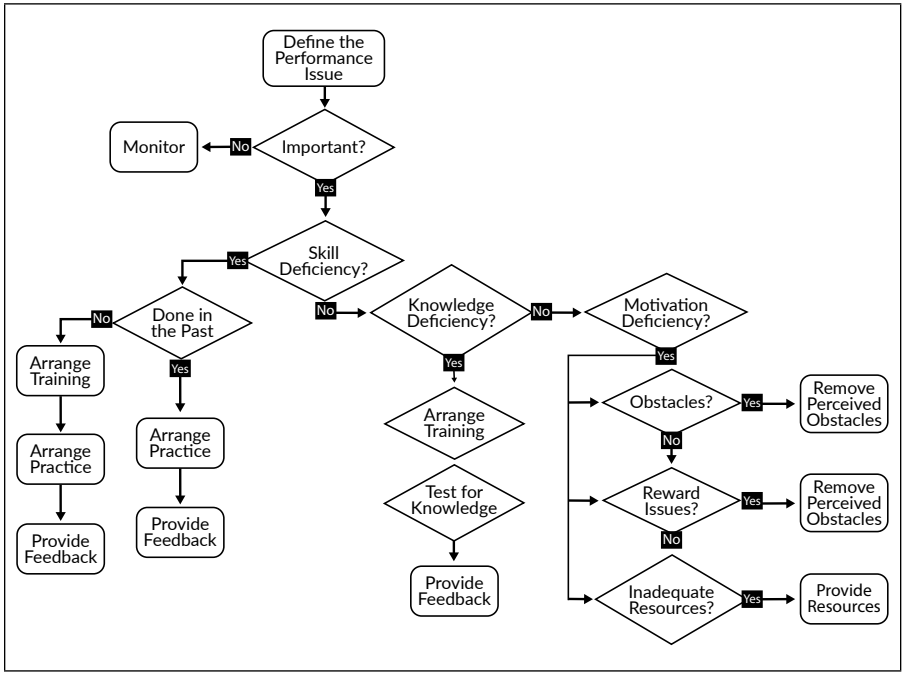


Figure 6. Decision Matrix: Where to Focus Employee Development Efforts

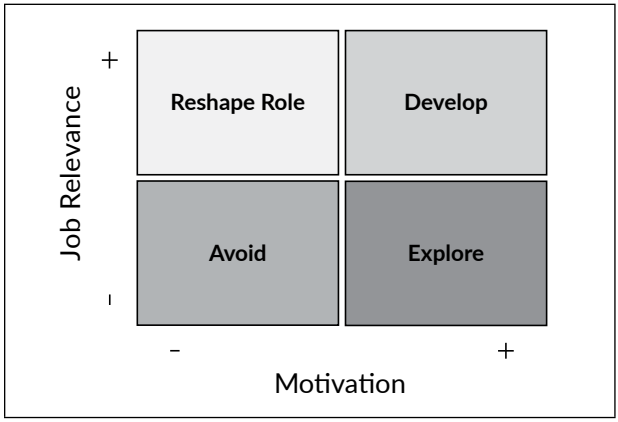


Figure 7. Template for an Example Employee Development Plan

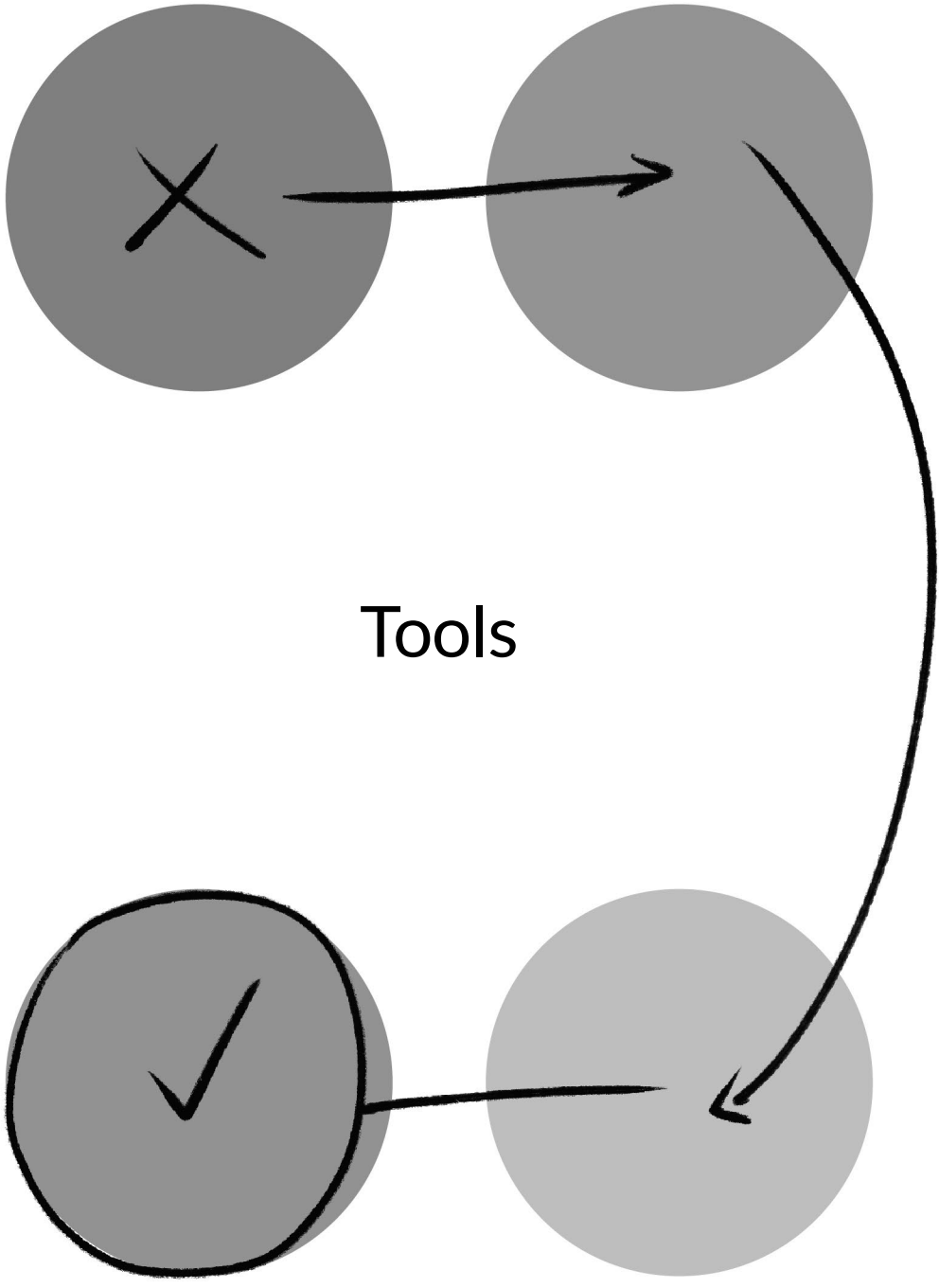
	Training and Development Goal	Competencies or Skills to Be Acquired	Action Steps	Resources Needed
Short-term goals and activities (1 year)				
Long-term goals and activities (2-3 years)				

Figure 8. Template for an Employee Engagement Review Meeting

	Performance Coaching Challenge	Strategy to Address the Challenge
Enlighten (lack of awareness)		
Encourage (lack of motivation)		
Enable (lack of abilities)		

Figure 9. Sample Performance Improvement Plan Worksheet

Performance Problem:			
Action Steps *(What specific steps will be taken?)*	**Person responsible?**	**Date to Be Completed**	**Success Criteria** *(How will I know when each action has been accomplished?)*
1.			
2.			
3.			


Tools

Tool 1. Tips for Facilitating Successful Feedback Outcomes

Understanding

1. Structure the environment to minimize distractions and maximize focus.
2. Introduce and structure the feedback session with clearly defined goals and intended outcomes.
3. Check your biases about the feedback receiver's current performance and potential.
4. Explain what information you will be sharing with the employee (your observations, observations of others, 360-feedback results, or performance behavior).
5. Schedule enough time to adequately cover all the feedback information you want to share.

Acceptance

1. Before jumping into sharing feedback information with the employee, take time to ask about their perceptions of their current performance and their ideal or future self.
2. Listen for responses that suggest employee defensiveness, negative emotional reactions, or dismissal of the credibility or accuracy of the feedback information hared.
3. Periodically check with the employee to summarize their perceptions about what is validating and what is surprising in the feedback information presented.
4. Regularly check with the employee and ask them to summarize what they agree and disagree with in terms of the feedback shared.
5. Focus on the areas the employee agrees with and accepts.

Commitment to Action

1. Ask the employee what, if anything, they might be motivated to further consider or take specific action to leverage concerning the strengths you shared or potential development areas.
2. Ask the employee how their commitment to action can be translated into a goal they want to work on that will be helpful for them in the future.
3. Ask the employee what barriers might prevent them from successfully reaching this goal.
4. Ask the employee what you can do as a coach, mentor, or peer to help support their success in reaching the goal.
5. Ask the employee how they can measure and evaluate their success in translating feedback from the meeting into successful behavior change perceived by others.

Tool 2. Tips for Creating a Supportive Feedback Climate

Set the Stage for Psychologically Safe Feedback Conversations
Welcome the employee and share the purpose of the feedback meeting. Remember: How you share feedback can hinder or facilitate a safe conversation.

Allow the Employee to Express Emotions
Feedback can inspire both positive and negative emotions. Listen for understanding and acknowledge the employee's emotions and feelings. For example:

- "I understand this conversation may be difficult."
- "I can see from your reaction that the feedback I have shared with you is upsetting."

Consider Offering Impact Statements
Describing specific behaviors and sharing their influence on the team, and on you as the leader, can increase the employee's awareness and minimize their emotional reactions. By sharing that influence, you provide the employee with information about how their actions or words are perceived by others. This can set up a safe path toward a commitment to behavior change in the future.

Seek to Understand Before Being Understood and Validate the Employee's Feelings
Listen for understanding at three levels (the content of the statement, the feelings of the employee, and the employee's need) to validate their experience in the conversation. Providing emotional reassurance signals support, empathy, and caring. For example:

- Listening for content: "What I am hearing you say is . . ."
- Listening for emotion: "It sounds like you may be feeling . . ."
- Listening for need: "I'm getting a sense that you want . . ."

Check In and Follow Up
When difficult conversations are necessary and the employee expresses negative (or even positive) emotions, it is important to have a follow-up or check-in meeting later to acknowledge the employee's reaction and reinforce that they are not alone and their perspective matters. This meeting can be formal or informal, but it should occur as soon as possible after the initial feedback meeting.

Tool 3. Unconscious Bias Exercise: My Trust Circle

Write down the initials of five people in your life you most trust and feel comfortable with in the top row of the table. Don't include family members. Look at the descriptors in the table and check the box if the person's characteristic and yours are similar. (For example, if you and person 1 are both introverted, you'd check that box. But if person 2 is extroverted, you wouldn't check that box in their column.) Then answer the reflection questions.

My Trusted Five	1 _____	2 _____	3 _____	4 _____	5 _____
Introvert or extrovert					
Age					
Gender					
Education					
Religion					
Disability					
Sexual preference					
Ethnicity					
Income or wealth					
Political orientation					

Reflection questions:

1. What does this information illustrate about those you most trust and why?
2. What opportunities do you have in your workplace to interact with and listen to others whose experiences, backgrounds, and opinions are different from your own?

Tool 4. Unconscious Bias Exercise: Reflecting on Stereotypes

As you read across each row in this table, think about how you naturally react to each phrase. Note whatever comes to mind. Be honest and try to bring to the surface any biases you might be aware of. Then answer the reflection questions.

Column A	Column B	Column C
Is very slender	Is very short	Is overweight
Is ultrareligious	Is agnostic	Is spiritual
Likes rap or hip-hop music	Likes classical music	Likes heavy-metal music
Owns a dog	Owns a cat	Owns a snake
Women with many visible tattoos	Men with many visible body piercings	People with unusual hair colors
52-year-old unmarried woman	52-year-old married woman	52-year-old unmarried man
Is under 25	Is middle-aged	Is over 65
Resides in a large city	Resides on a farm	Resides on a ranch
Female CEO	Male nurse	Female police chief
Is LGBTQ+	Is transgender	Is a nonbinary
Men who get manicures	Women who drink beer	Women who shave their heads
Elderly drivers	Teenage drivers	Truck drivers
Has an eating disorder	Has a mental illness	Has a drug addiction
Owns firearms	Doesn't own firearms	Supports the NRA
Drives an electric vehicle	Drives a gas vehicle	Drives a hybrid vehicle
Shares conservative political beliefs	Shares liberal political beliefs	Shares conspiracy theories
Did not attend college	Attended an elite university	Has a PhD
Couples with large families	Couples with small families	Couples with no children
Never divorced	Divorced once	Divorced several times
Speaks with an accent	Speaks multiple languages	Lived in several countries
Immigrated to this country	First-generation American	Multigenerational American
Has strong pro-life beliefs	Supports capital punishment	Supports legalizing assisted suicide
Avid adult skateboarder	Avid deer hunter	Avid pickleball player

Reflection questions:

1. **Recognize bias:** Select several of the categories and note what classifications, judgments, and stereotypes emerged from your reflections.
2. **Challenge bias:** Is it possible that some people who fit into each box might not fit the stereotypes your bias led you to note? Can you put yourself into the shoes of a person that fits the description in one of the boxes to better understand their experiences in life?
3. **Modify bias:** What initial impressions, judgments, and biases can you set aside in the social interactions you have with others? How could you go about doing that?

Tool 5. Checklist for Giving and Receiving Feedback in Diverse Teams

- ☐ When giving feedback, focus on observable facts; avoid evaluation ("That wasn't very motivating") and expressing emotions ("The team was bored with your slides").
- ☐ When expressing an opinion, use "I" statements rather than "we" or "you" statements.
- ☐ Manage diverse expectations around giving and receiving feedback by defining and agreeing upon specific norms for how and when it will be provided to the team.
- ☐ Use check-in meetings to solicit input from direct reports; use a "start doing," "stop doing," and "do differently" structure to elicit specific behaviors you can work on.
- ☐ Use 360-degree feedback assessments for each team member to compare self-impressions of behavior to those of their teammates. Compile results for all team members that can be used to highlight team strengths and possible blind spots to improve team functioning.
- ☐ Encourage team members to meet individually with one another and use the "start, stop, and continue" structure to share impressions of one another confidentially, openly, and candidly.
- ☐ Use "feedback dating" sessions in team development meetings to enhance openness and trust. Team members are paired together to give and receive feedback (three minutes each) and then rotate in pairs to give everyone a chance to share with each other.
- ☐ Use the 3A's method to minimize power discrepancies in relationships (Meyer 2023):
    - **Assist.** The message should be feedforward with the genuine desire to help the other individual improve and grow.
    - **Actionable.** The message should be specific about behaviors to do more, do less, or do differently that is observable and measurable.
    - **Asking first.** Power discrepancies often lead to entitlement or the belief that those in power (such as, men in leadership positions) have a right to share and give feedback even if it's not solicited or wanted. Unless someone has asked for direct feedback from you, *ask first* what feedback the other person might have for you *before* sharing your feedback (even if it's well-intentioned).

Tool 6. Habit Change Exercise 1

Practice Your Signature With Your Nondominant Hand

Ask the employee to write their name with their *dominant* hand. Then ask them to write it with their *nondominant* hand.

Reflection Questions

1. How much time did it take you to write your name with your nondominant hand compared with your dominant hand?
2. How much thinking did you have to do and how difficult was it for you to write your name using your nondominant hand?
3. What was the quality and clarity of your name written with your nondominant hand compared with your normal signature?
4. How long do you estimate you would need to practice writing your name with your nondominant hand to make it as easy to do as with your dominant hand? And with the same quality? (Days? Weeks? Months?)
5. What does this exercise suggest about concentration, effort, and competence for a behavior-change journey you might make in the future?

Tool 7. Habit Change Exercise 2

Creating Goal Intentions and Practice Plans

Goal intentions are general statements about what a person wants to achieve in developing one or more competencies at a behavioral level (goal). In the first box, have the employee write down what they are trying to achieve and the key outcome. Ask them to be specific—a goal to be a better leader is too broad, but improving strategic-thinking skills is more actionable.

Goal practice plans have two parts. The first is a time, situation, or opportunity that triggers a desired behavior—a cue. The second describes the specific behavior a person will be doing more, less, or differently to develop into an ongoing habit.

Use the second and third boxes to consider the "if" (cue or trigger) and "when" (behavior) of your employee's desired behavior. Using practice plans following this approach has been shown to be two to three times more effective in translating insight from goal intentions to deliberate practice and successful behavior change.

Goal
(Intention or outcome)

Cue
("If or when . . .")

Behavior
(What I will be doing more, less, or differently)

Tool 8. Habit Change Exercise 3

Questions to Ask Employees to Enhance Openness to Behavior Change

Leaders typically activate either a task-positive network (TPN; problem-oriented and solution-focused) or default mode network (DMN; listening and seeking vision or positive forward-looking emotion) in employees, depending on their communication and feedback style preferences.

When employees have activation in the DMN, they evaluate the interpersonal interaction as more pleasant, are more receptive to feedback, and are more motivated to translate insight into deliberate practice to change behavior.

Here are five questions that leaders can ask employees when they are having difficult discussions around performance and when negative feedback needs to be shared to decrease defensiveness and potentially negative emotional reactions:

1. Describe a situation when you were at your very best. What did you do? What were your thoughts and feelings?
2. What do you want out of life? What are your vision and dreams of your ideal life?
3. What are your passions and loves in life? How do you strive for these?
4. Who is the person you want to become? What legacy do you want to create for your life?
5. How are you currently seen by others, and what are your signature strengths? How can you leverage and put your signature strengths to work more in the future?
6. What changes would you want to make to realize your ideal self, based on your current self?

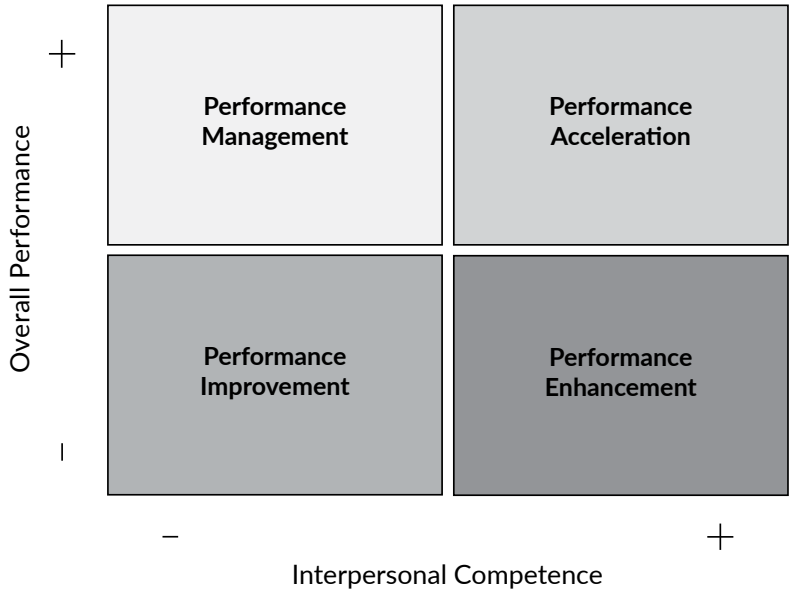
Tool 9. Checklist for Creating a Supportive Interpersonal Climate for Feedback Coaching Meetings Leading to Successful Behavior Change

- ☐ **Set the stage for safe feedback conversations.** Welcome the employee and share the purpose of the feedback meeting. How you share the feedback can either hinder or facilitate a safe conversation.
- ☐ **Allow them to express emotions.** Feedback can create both positive and negative emotions. Listen for understanding, acknowledging emotions and feelings in the employee you are speaking to. (For example, "I understand this conversation can be difficult" or "I can see from your reaction that the feedback I have shared with you seems to be upsetting.")
- ☐ **Consider offering impact statements instead of feedback.** Describing their behavior specifically and sharing the influence it has on you and the team can increase awareness and minimize emotional reactions. By sharing impact, you provide the employee with information about how their actions or words are perceived by others, which can prepare the way for a safe path for a commitment to change behavior in the future.
- ☐ **Seek to understand (before being understood) and validate feelings.** Listen for understanding at all three levels (content, feeling, and need) to validate your employee's experience in the feedback conversation. Providing emotional reassurance can signal support, empathy, and caring.
  - *Content example:* "What I am hearing you say is . . ."
  - *Emotion example:* "It sounds to me like you may be feeling . . ."
  - *Need example:* "I'm getting a sense you are wanting . . ."
- ☐ **Check in and follow up.** When difficult conversations are necessary and when negative (or even positive) emotions are expressed by the employee, it is important to have a follow-up or check-in meeting to acknowledge the reaction of the employee and to reinforce that they are not alone and that their perspective matters. This meeting can be formal or informal, but it should occur as soon as possible after the feedback meeting.

Tool 10. Performance Feedback Coaching Model: Exercise 1

Categorizing Your Direct Reports

Write the initials of your direct reports in the appropriate quadrant based on a relative comparison of their *overall performance* (that is, their skill level and performance) and their *interpersonal competence* (or their emotional and social intelligence).



After categorizing each direct report, use the strategies, techniques, and methods of the Performance Feedback Coaching Model to more effectively provide feedback that will be understood, accepted, and will increase employees' motivation to change their behavior on the job.

Tool 11. Performance Feedback Coaching Model: Exercise 2

Identify Which Performance Feedback Coaching Model to Use

The following situations describe two different employees, each of whom falls within a different quadrant of the Performance Feedback Coaching Model. As you read through them, decide which coaching approach you would use and check the box indicating your choice.

Meet Chris

Chris is a 54-year-old pediatric surgical oncologist at St. Peter's Hospital. They have been working there for about 14 years. As a well-known oncologist, they have achieved outstanding results with patients, established an international reputation in research, and been recognized for innovations in surgical procedures by their peers. Chris currently supervises seven surgical oncology residents and oversees six staff members within the oncology department.

Recently, some of the staff and residents have complained about the way Chris leads them. They don't feel empowered or motivated. They claim that Chris does not listen to them and is constantly criticizing them. These complaints have led to diminished performance for the team. While everyone on the team respects Chris for their knowledge and surgical skills, most complain that Chris's feedback style and temper are belittling and personal. The team also says Chris comes across as extremely arrogant and disrespectful to those who are less experienced.

Chris needs:

- ☐ Performance acceleration
- ☐ Performance improvement
- ☐ Performance management
- ☐ Performance enhancement

Tool 11. (cont.)

Meet Aaron
Aaron is a 38-year-old manager of financial services at NationCorp Financial. He has an MBA from a prestigious school and has worked for four years in financial services.

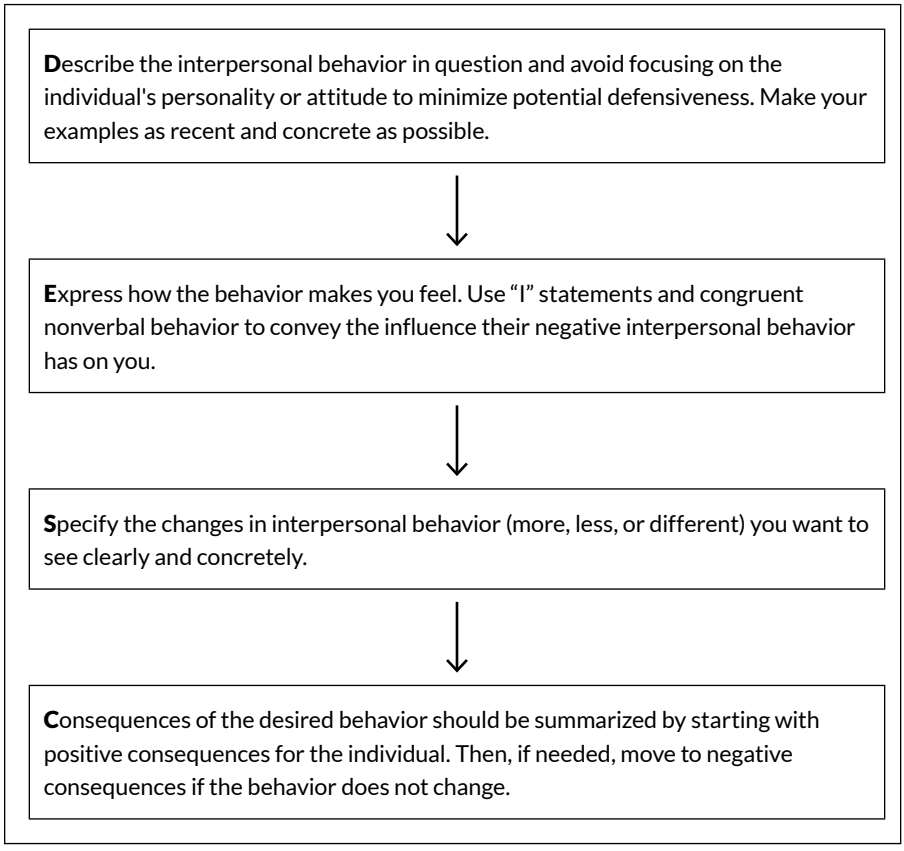
Recently, individual and team performance in Aaron's department has declined due to a lack of individual coaching and team development on Aaron's part. He has great relationships with the team members but is not perceived as a strong influencer and communicator. Aaron struggles with time management, team presentations, and capturing his team's attention during group meetings. He claims to be overwhelmed and does not have time to fulfill his own assigned tasks and manage the tasks of others. Aaron needs:

☐ Performance acceleration
☐ Performance improvement
☐ Performance management
☐ Performance enhancement

Answers to Performance Feedback Coaching Model Exercise 2:

- *Chris needs performance management feedback coaching strategies.*
- *Aaron needs performance enhancement feedback coaching strategies.*

Tool 12. Performance Management Feedback Coaching: Providing Feedback Using the DESC Technique



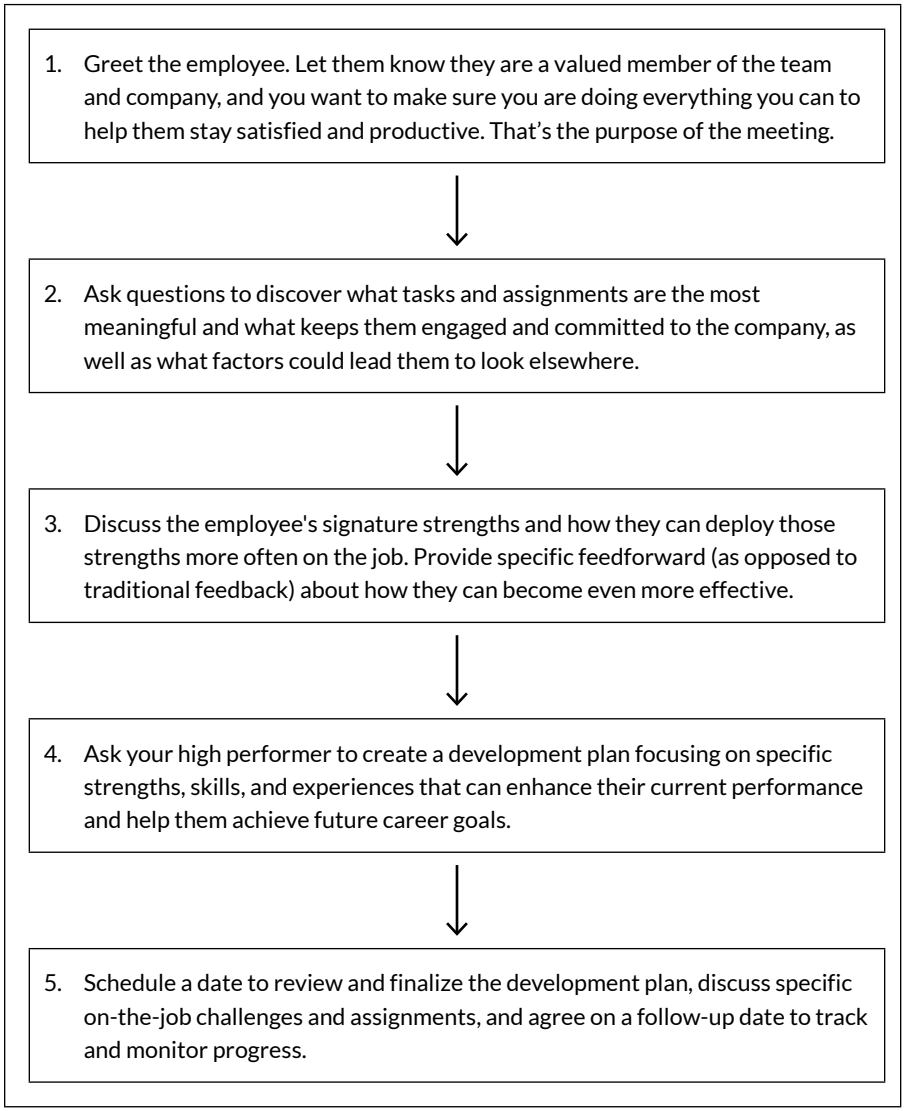
Tool 13. Dos and Don'ts for Communicating With an Interpersonally Challenging Employee

What to Do to Enhance Understanding and Acceptance	What Not to Do to Maximize Defensiveness and Conflict
Do remain calm and collected even when the employee deflects blame onto you. Always pause before you respond.	Do not become overly emotional and reactive to the employee's statements.
Do frame your feedback in a way that motivates the employee to see what's in it for them.	Do not frame your feedback in a way that makes it about your needs.
Do praise the employee when they behave correctly.	Do not only focus entirely on what the employee is doing wrong.
Do use "I" statements or ownership statements that do not put blame on another person.	Do not use "you" statements because they can be interpreted as an attack.
Do give feedback on the specific behavior you want to see change.	Do not give feedback about the employee's personality, style, or character.
Do focus your feedback on the impact of the behaviors.	Do not use the "sandwich technique" (starting and ending with what the employee does exceptionally well, and explaining how this could be compromised by interpersonal deficits in the middle).

Tool 14. Tips for Performance Management Feedback Coaching

- ☑ Focus on developing the employee's social, interpersonal, and communication skills, improving overall emotional and social competence, and helping them eliminate interpersonal blind spots.
- ☑ Keep in mind that this group believes their "competence" is more important than their influence and social skills. In other words, getting things done and getting ahead are far more important than getting along with others.
- ☑ Expect this type of employee to be somewhat defensive and challenging because they tend to lack self-awareness about how their behavior is perceived and experienced by others. Be concrete and specific about what behaviors should be done more, less, or differently.
- ☑ Frame the feedback dialogue so your employee can see what's in it for them. They need to believe the feedback is for their benefit.
- ☑ Let them know you can help make them successful and that you are a champion working on their behalf to ensure they are valued for their competence, expertise, and skills, as well as their ability to work well with others.
- ☑ Use a developmental 360-degree feedback process and other tools, together with a five-factor personality inventory, to help the employee discover their strengths and potential interpersonal areas for development.
- ☑ Explore whether the employee is open to working with an external executive coach to increase their insight about interpersonal deficits and challenges.
- ☑ Encourage the employee to work with an internal or external mentor who can serve as an objective sounding board for discussing challenging issues that could derail their career despite strong technical skills and abilities.
- ☑ Create, communicate, and stand behind norms, policies, and values focused on civility, inclusivity, and a culture that doesn't tolerate bullying. Calling out such negative interpersonal behavior and microaggressions will be valued by other team members. Communicate that "jerk" behavior is not tolerated in the team or organization.

Tool 15. Five Steps for Holding a Signature Strengths Conversation



Tool 16. Performance Acceleration Coaching Role Play

Using the following scenario, you will play the role of a supervisor in your organization tasked with conducting a performance acceleration coaching meeting with a high-potential employee named Julio O'Brien. Julio is already an effective and valued team member within his department and the organization.

Purpose

The purpose of the performance acceleration coaching meeting will be to:

1. Explore what aspects of work are engaging to Julio.
2. Provide candid feedback about Julio's current strengths, development areas, and potential to the organization.
3. Identify Julio's personal career goals and development plans.
4. Initiate a professional development plan.

Situation

You believe that Julio is a high-potential talent who the organization should invest in and develop further. Your own manager wants to know what you know about Julio's career goals and potential. You mention he has been a tremendous performer—highly motivated and committed to the organization—in the year you've been directly supervising him.

Your manager asks whether Julio has any leadership development plans in place. You mention that you just scheduled a developmental discussion meeting and will be focusing on goals for the future. Most recently, Julio has been serving in an independent contributor or specialist staff role for the organization, and you don't know if he wants to stay in a leadership role. In the upcoming conversation, you plan to explore Julio's leadership career goals and initiate a formal professional development plan.

Expectations

Your purpose in this 20-minute meeting is to begin a discussion that results in a development plan to enhance one or more critical competencies for Julio's successful performance now and in the future. You also want to discover Julio's leadership goals and how he believes the organization can best employ his experience, skills, and knowledge.

Meeting Prep

Take five minutes to prepare and plan your approach to this developmental coaching meeting. If you have a partner available, role-play the scenario with them and ask them to provide feedback about:

- What you could do more, less, or differently to clarify specific development goals
- How to reach commitments around the resources needed to achieve those goals
- How to get commitment for follow-up

Tool 17. Performance Acceleration Coaching Activities, Tasks, and Assignments to Support Employee Development

Activity, Task, Project, or Assignment	Examples
Startup Experiences These assignments emphasize starting new departmental and organizational programs, processes, or projects from start to finish.	1. Chair a taskforce on a business problem. 2. Go off-site to troubleshoot problems or improve processes. 3. Install a new system, program, or procedure. 4. Initiate a large-scale change project within the organization. 5. Plan an off-site meeting, conference, or major event. 6. Serve on a new project or product review committee. 7. Work on a short-term international startup initiative.
Fix-It Experiences These assignments emphasize team building and dealing with a specific crisis or problem in which high conflict is likely. These might involve dealing with emotionally charged situations that require motivating and developing others or addressing task, people, and process challenges in a team or organization.	1. Manage an inexperienced project team. 2. Manage a dysfunctional team. 3. Resolve conflict among direct reports. 4. Manage a group of low-competence or low-performing employees. 5. Assign a challenging project that failed previously. 6. Close a department, unit, or failing business.
Development Experiences These assignments emphasize stretch assignments that expand and develop existing knowledge, skills, abilities, and experiences.	1. Conduct a competitive SWOT analysis. 2. Create a strategic plan for a department. 3. Conduct a market analysis with recommendations for gaining market share. 4. Coordinate a process improvement initiative. 5. Chair or participate in a cross-functional team.

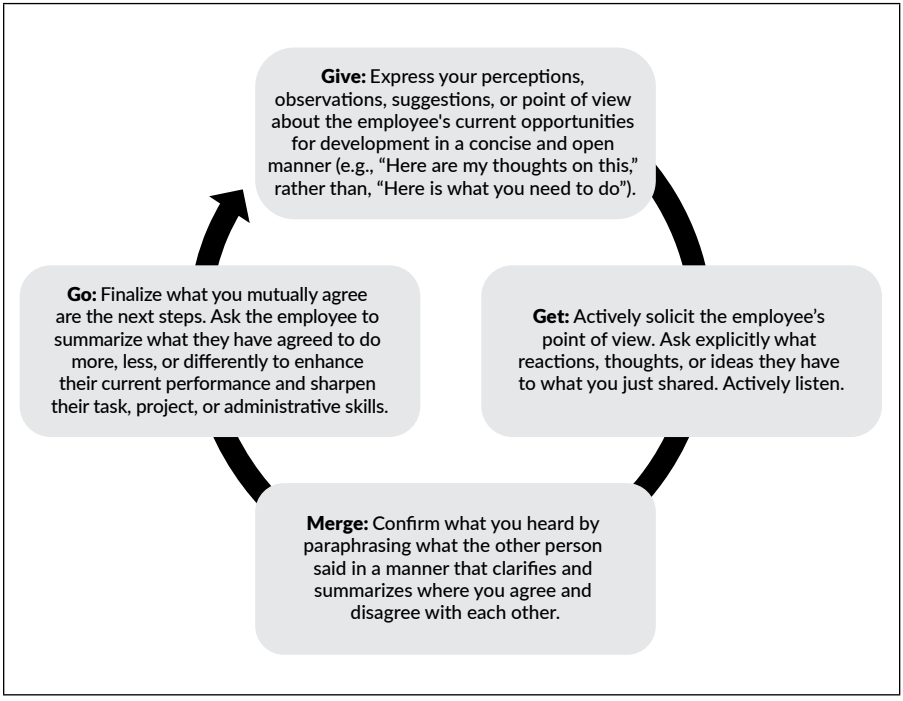
Tool 17. (cont.)

Activity, Task, Project, or Assignment	Examples
Coaching or Mentoring Others These tasks emphasize something an employee needs to know or intellectual pressure, either of which can lead to heightened self-awareness.	1. Teach someone how to do something they are not an expert in. 2. Serve as an external executive coach. 3. Serve as an internal or external mentor. 4. Identify a senior leader sponsor and champion who is respected and successful.
Outside Work Activities These activities take place away from work and emphasize individual leadership and working with new people. They may also involve learning to influence, communicate more effectively, and persuade others.	1. Join a community or governmental board. 2. Become active in a local volunteer or charitable organization. 3. Become active in a professional association in a leadership role. 4. Use your experience, knowledge, and skills to offer pro-bono work to schools, groups, and others.

Tool 18. Tips for Performance Acceleration Feedback Coaching

- ☑ One of the best predictors for enhancing continued engagement, commitment, and satisfaction in high-potential and high-performing leaders is the perception of making progress in meaningful work (Amabile and Kramer 2011). Because high-performing leaders are often viewed as less needy than others, it is important to schedule regular check-ins to explore and discuss barriers to performance.
- ☑ For high-potential and high-performing leaders, it is important to observe and point out how the overuse of their skills and style may get in the way of their ongoing performance.
- ☑ Moving leaders from good to great requires more specific, timely, and concrete feedback to share what they already are doing very well. It's the little pointers, suggestions, and tips that such high performers crave to become even better over time.
- ☑ As the old saying goes, "catch them doing things right" and reinforce and recognize both their outstanding efforts and accomplishments. Feeling ignored or not noticed can erode both engagement and commitment to the organization.
- ☑ Define and discuss career trajectories and ongoing professional development on a regular basis. Explore and encourage such leaders to seek internal and external champions, mentors, and coaches to continue their ongoing growth. Such investments in these leaders result in high ROI for the organization.
- ☑ Explore, discuss, and create meaningful work assignments and tasks that use their signature strengths and capabilities. Refrain from just adding more tasks and projects that you know they will do well just because they are strong performers. Make sure new assignments and projects are well-suited to their career strengths, interests, and goals.
- ☑ Demonstrate trust and psychological safety by providing these leaders with flexibility and autonomy to decide where, when, and how their work gets done based on agreed-upon performance goals and standards. With such leaders, perceptions of micromanaging create mistrust and a lack of commitment to team goals.

Tool 19. Providing Feedback Using the Give-Get-Merge-Go Technique



Tool 20. Questions for Analyzing Performance Deficiencies

Knowledge, Skills, and Abilities Analysis

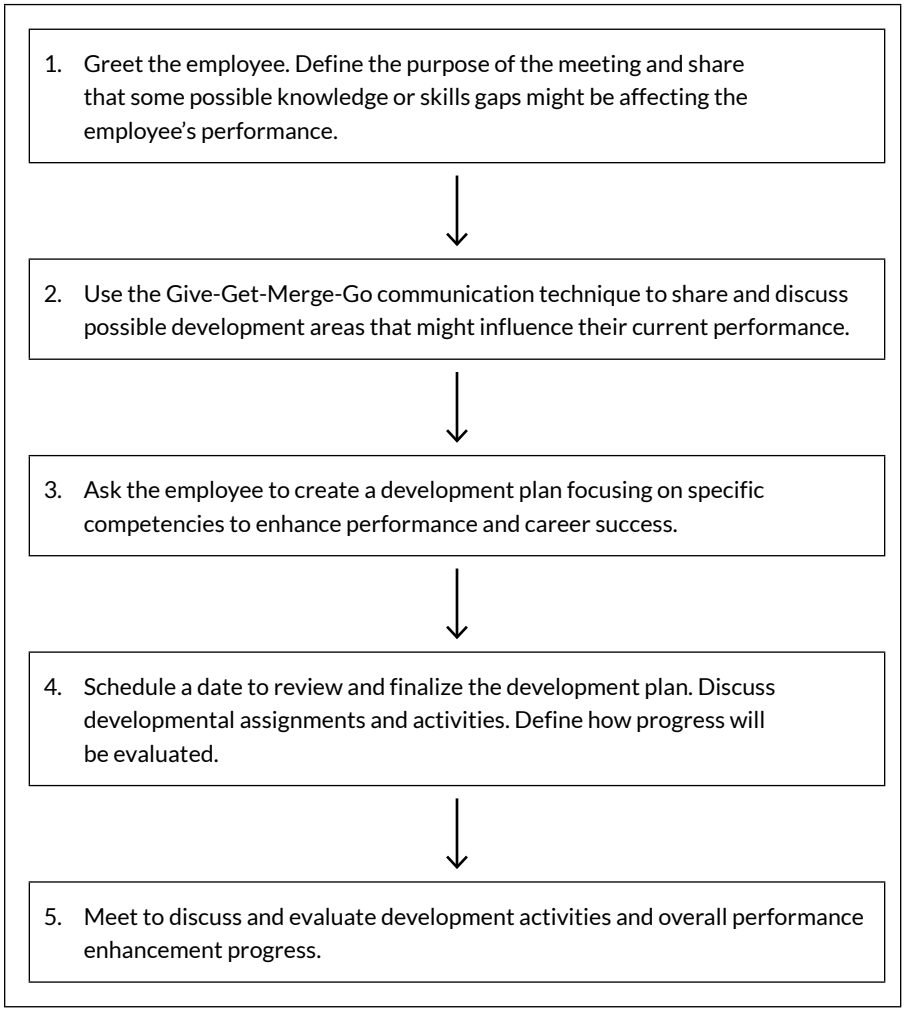
Knowledge Deficiency	Questions
Did the employee know it in the past?	• How often is the knowledge used? • Has there been institutional forgetting? • Is it a one-time situation? • Can I provide a simple job aid or manual? • Can I store the needed information in an easy-to-access location (e.g., wiki, intranet, or phone app)?
Skills or Ability Deficiency	**Questions**
Could the employee do it in the past?	• Did they once know how to perform as desired? • Have they forgotten what to do? • How often is the skill used? • Is it a difficult skill to perform? • Is there regular feedback about how well the skill is performed? • How does the employee find out how well they are performing this skill? • Can I model, coach, or show them how to perform the skill? • What informal training can be used (e.g., peer instruction, mentoring, or coaching)? • What formal training programs might help improve skill performance?

Tool 20. (cont.)

Motivational Analysis

Motivational Deficiency	Questions
Does performing really matter to the employee?	• Were they motivated in the past? • Do the standards you have match the employee's standards? • Is there a favorable outcome for performing that matches the wants and needs of the employee? • Is there a source of satisfaction for performing? • Does the performance lead to positive recognition and outcomes that the employee values? • Can the employee take pride in their performance as an individual or member of a team? • Is there any competition or metrics of success that the employee can use to evaluate their performance?
Are there obstacles to the employee's ability to perform?	• Is the employee clear on what is expected? • Are there conflicting demands on the employee? • Is the employee overloaded and stressed? • Does the employee lack authority, control, time, equipment, or supplies? • Are there restrictive policies or norms that interfere with performance?
What solution is best?	• Does each solution address one or more of the problems identified during the analysis (e.g., knowledge, skill, or motivational deficiencies)? • What is the cost of each potential solution? • What are the consequences of not addressing the problem?
What resources exist to help the employee with this performance issue?	• Which solutions are most practical, feasible, and economical? • Which solution will add the highest value for the least effort? • Which solution is best for company culture? • Can your manager or human resources provide information and support? • Can the EAP provide information and support?

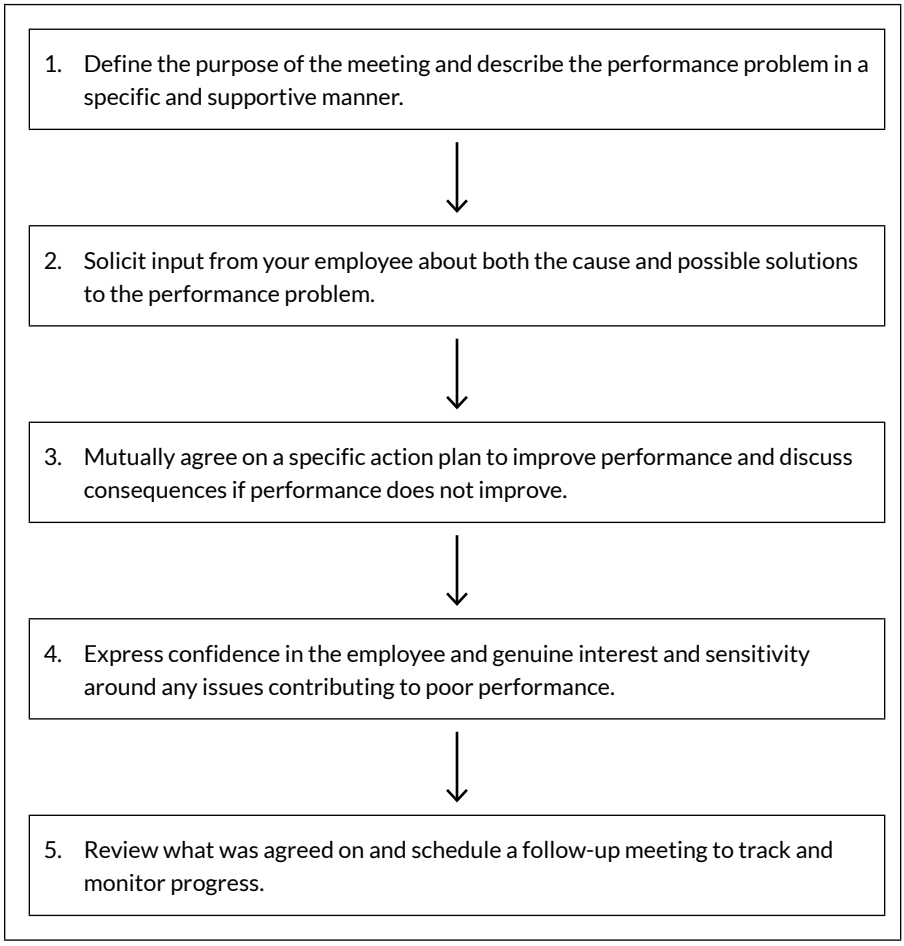
Tool 21. Five Critical Steps for Holding Performance Enhancement Feedback Coaching Conversations



Tool 22. Tips for Performance Enhancement Feedback Coaching

- ☑ Keep in mind that these individuals have some coachable areas of improvement to enhance their effectiveness and success. Focus on identifying and developing specific task and project management, communication, and job-related skills to enhance their overall performance.
- ☑ Expect this type of employee to be open and responsive to feedback. They will be motivated to create development plans that target specific knowledge, skills, abilities, and approaches to improve their current job performance and positively influence their professional and career growth within the company.
- ☑ There are several ways that employees learn, grow, and develop. Matching their preference and style for knowledge and skill acquisition is important to engender buy-in on the part of the employee and ensure they translate their new knowledge back to the job (e.g., from classes, conferences, workshops, coaching, mentoring, online seminars, and so forth).
- ☑ It is imperative to define what improvement looks like and how it can be measured to influence job performance. Put into place a supportive development plan with specific activities, benchmarks, and metrics to evaluate improvement over time.
- ☑ Consider using a 360-feedback assessment to provide concrete recommendations and suggestions to these individuals to help facilitate their development plans. Using a habit change or learning transfer platform like Envisia Learning's Talent Accelerator can help you measure actual behavior change success, along with repeating the 360 assessment as a follow-up measure.
- ☑ The more participative and interactive the feedback interaction and development planning (e.g., using the Give-Get-Merge-Go technique), the greater the likelihood these individuals will be intrinsically motivated to work to improve specific skills and abilities.

Tool 23. Performance Improvement Feedback Coaching Steps



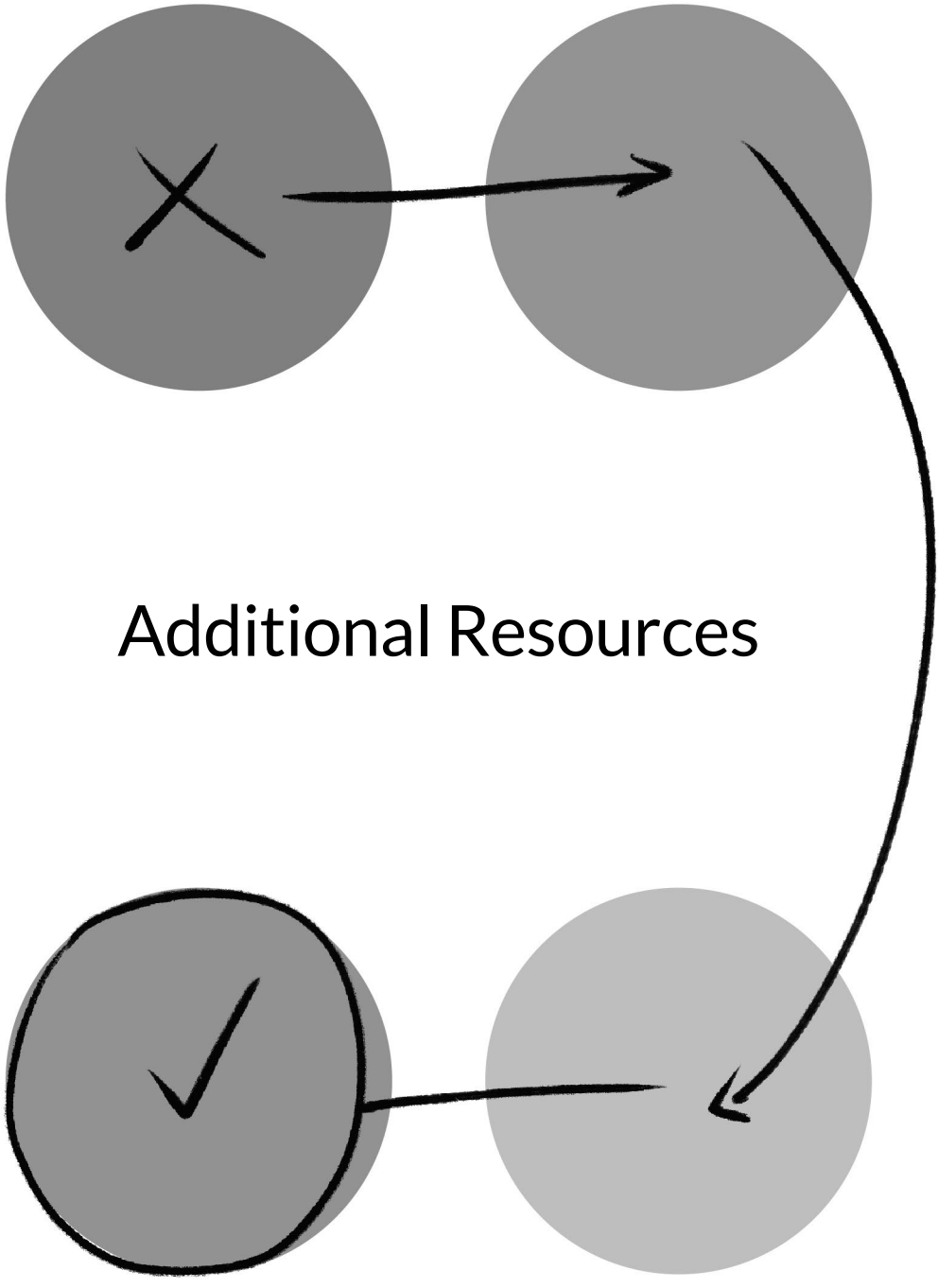
Tool 24. Performance Improvement Feedback Coaching Behavioral Checklist

As coaches, we need to monitor our own behavior to ensure we will make the most of our time with each employee. As you review and evaluate your meetings with employees to discuss performance issues, reflect on whether *you* demonstrated each of these valuable behaviors:

- ☐ I greeted the employee, defined the *purpose* of the meeting, and created a supportive climate to discuss recent changes in their performance.
- ☐ I shared specific events and changes in the employee's performance in a nonevaluative and factual manner (i.e., focusing on the problem, not the personality, of the employee).
- ☐ I solicited input from the employee about the cause of recent performance changes and possible solutions to improve their performance (i.e., involving the employee in the solution, rather than prescribing a solution).
- ☐ I maintained the esteem of the employee by recognizing their past accomplishments and providing encouragement for continued outstanding performance.
- ☐ I expressed genuine interest, concern, warmth, and sensitivity toward the employee's personal or family problems and expressed my open-door policy and desire to assist in any way I could.
- ☐ If applicable, I made a referral to the EAP.
- ☐ I discussed the consequences or next steps if the employee's performance does not improve.
- ☐ I defined a mutually agreed on action plan for performance improvement using practice plan goals (e.g., on-the-job training, outside education, scheduling changes, or coaching).
- ☐ I summarized the coaching meeting, asked the employee for their commitment to improve, and scheduled a follow-up date to review performance progress.

Tool 25. Tips for Performance Improvement Feedback Coaching

- ☑ Seek a consultation with your HR department and legal team to ensure you are following company best practices related to progressive discipline procedures, record keeping, and necessary risk management measures.
- ☑ Explore the employee's own explanation for changes in their recent performance. For non-work-related factors, listen for understanding and make a referral to an internal EAP or external support resources.
- ☑ Timeliness is critical in successfully addressing performance improvement issues with employees. Although most leaders dislike constructively confronting poor performance, the longer it is not addressed the harder it is to manage and the more it will affect the engagement level of the team working with the employee performing poorly.
- ☑ Redefining performance expectations, standards, and KPIs is critical for gaining understanding and acceptance by the employee about what aspects of performance need to be addressed.
- ☑ Asking employees for their ideas about how to solve their current performance challenges is important to engender buy-in for one or more solutions and to enhance intrinsic motivation to improve.
- ☑ Negotiating a reasonable follow-up date to monitor, track, and discuss performance improvement behaviors and efforts is imperative. Schedule the follow-up meeting after an initial conversation has occurred.
- ☑ Always share any resources, support, and assistance for the employee to address their current performance issues and challenges. You should be perceived as an ally and champion on behalf of the employee to increase trust and their commitment to seriously address performance shortcomings.



Additional Resources

A Selected List of AI Tools for Performance Feedback and Coaching

(As of December 2024)

AI Search Engines and Coaching Platforms for Leaders and Employees

- Aceup Coaching Platform (aceup.com)
- Andi (andisearch.com)
- Opera (opera.com)
- Bettercoach (bettercoach.io)
- Microsoft Bing Copilot (bing.com/chat)
- Bravely (workbravely.com)
- Butterfly Leadership Coaching (caterpillar.ai)
- ChatGPT (chat.openai.com/auth/login)
- Coachhub Digital Coaching Platform (coachhub.com)
- Cultivate Intelligent Coaching Platform (go.perceptyx.com/recording-cultivate-the-next-generation-of-leaders-with-intelligent-coaching)
- Google Gemini (gemini.google.com)
- EZRA Coaching (helloezra.com)
- Komo AI (Komo.ai)
- Ovida Skills Development Platform (ovida.io)
- Phind (Phind.com)
- Sharpist Coaching Platform (sharpist.com)
- Skillsoft Coaching Platform (skillsoft.com/coaching)
- Sounding Board Leadership (soundingboardinc.com)
- Torch Coaching Platform (torch.io)
- UExcelerate Coaching Platform (uexcelerate.com)
- Valence AI Leadership/Employee Coach Platform (valence.co)
- You AI Assistant (you.com)

AI Coaching Conversation Chatbots

- AIcoach Platform (aicoach.chat/about)
- AIMY Conversational AI Coaching Bot (coachhub.com/aimy)
- Coach M AI Chatbot (transferoflearning.com/services/chatbot)
- Coach Vici (coachvici.com)
- EVoach AI Coach Chatbot (evoach.com)
- Growth Mindset AI Coach (Rocky.ai)
- LEADx LiveCoach (leadx.org)
- PocketConfidant AI Coach Chatbot (pocketconfidant.com)
- SIX AI Well-Being App (your6.com)
- Tuesday AI Mental Health Platform (besttuesdayever.com)
- Yoodli communication skills coach (app.yoodli.ai)
- Youper Mental Health AI Chatbot (youper.ai)

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