



CUNA
HR & ORGANIZATIONAL
DEVELOPMENT COUNCIL

Conducting *Fearless* Performance Reviews

A Framework for Transforming
Performance Progress Reviews into
Fearless Performance Coaching
Conversations



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Sunset Over
Black Earth Creek

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

— W. Edwards Deming

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.

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 supervisor have learned something about themselves and each other.



Conducting a *fearless* performance progress review is about the quality of the conversation.

It is not about the **form**.



Duelling Perceptions . . . Preparing for a performance review

A Mindset Continuum



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.

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

**Where are your supervisors along this scale?
Where do your frontline employees fall on this continuum?**

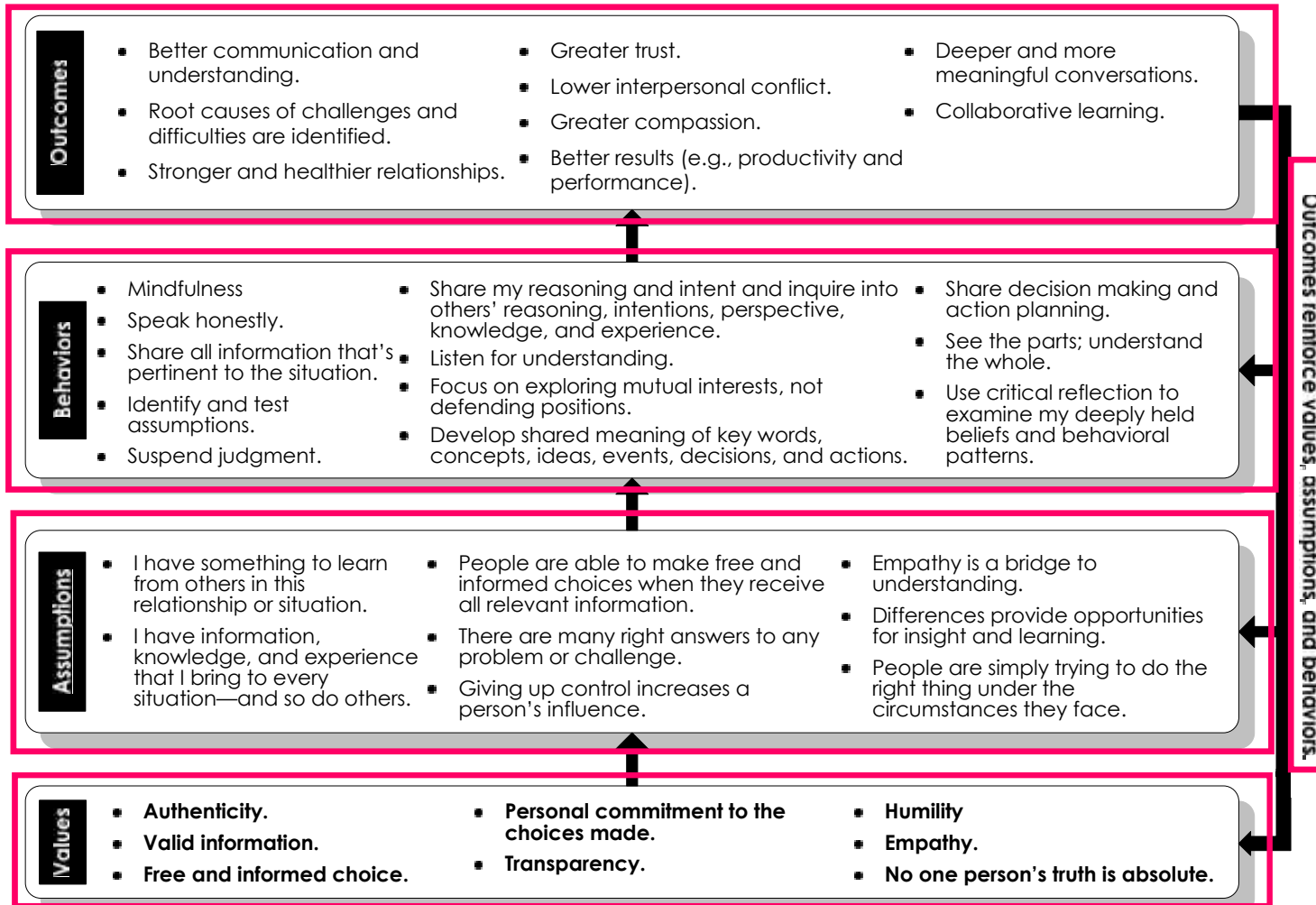
I have something to learn.

People are doing their best.

I only know part of the story.

We both can win.

Collaborative Mindset — A Winning Approach





Out beyond ideas of wrong-doing and right-
doing, there is a field. I will meet you there.

– Rumi, 13th Century Persian poet
b. 1207, d. 1273

When things go wrong . . .

Focus on CAUSE,
not **blame!**

Lustrafjord, Norway

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? Why?
 2. What isn't going well? Why?
 3. What changes/improvements could you make in your job to enhance your job performance? What will you keep doing?
 4. How can I best help you achieve your performance goals?
3. The supervisor independently conducts his or her own analysis of the employee's performance.

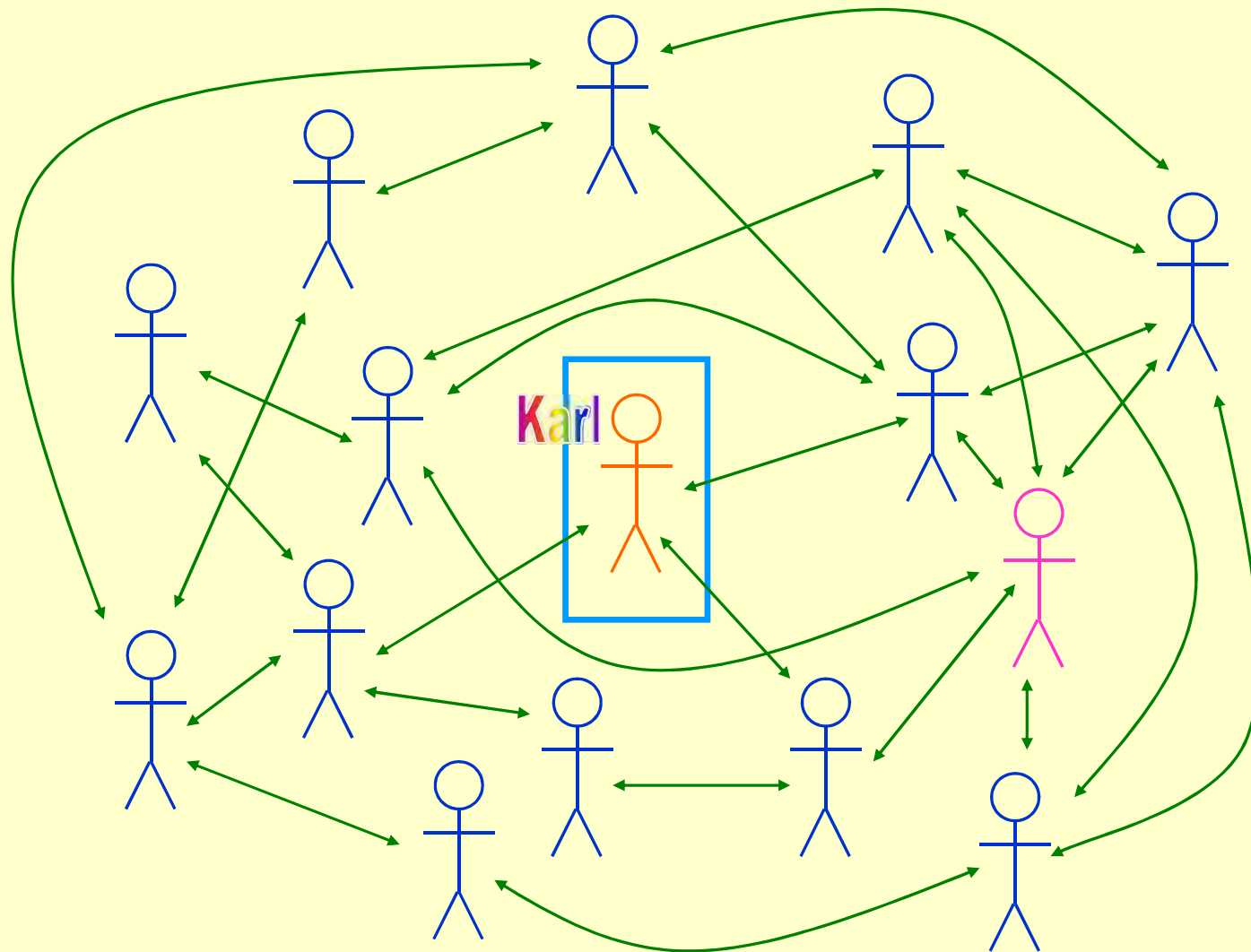
A **Fearless**, Employee-Centered Process

4. A collaborative process where, ideally, the employee leads the way in the performance review.
5. Supervisor and employee mutually define a path to performance success.
6. Supervisor or employee summarizes what was agreed-to.
7. If appropriate, the supervisor completes the final performance review form following the coaching conversation.



Want a detailed step-by-step roadmap to the coaching conversation?

- Stop by to see me after. I have about 15 copies available.
- You can also get a copy by:
 - E-mailing me at Jeff@RussellConsultingInc.com (see my bio on the inside of the cover page) OR
 - Giving me your business card (noting your request for the coaching conversation) OR
 - Visit my website: www.RussellConsultingInc.com – check out Recent Presentations and then click on today's presentation where you can then download the coaching conversation.



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

Coral Bay Sunrise
St. John, U.S. Virgin Islands

"This is going to take
more than one night!"

— Charles M. Schulz
Charlie Brown in "Peanuts"

Jotunheimen National Park

Thank you!

- Best of luck in conducting **fearless** performance reviews!
- Give me your B-card if you want to subscribe to our newsletter, **Workplace Enhancement Notes**

