###### Preparing for the conversation

1. (Optional) Manager enters employee-specific goals to discuss as part of the conversation.
2. (Optional) Employee completes this as a self-assessment and returns to the manager.
3. Manager rates each item using the scale below. Jot down comments, notes or examples of when the behavior was or wasn’t done well in the Comments column.
4. Manager uses the last page to summarize talking points and recommend one or two focus areas for improving consistency in the future.
5. Manager and employee have a high-level conversation about the listed goals/behaviors and then focusing on the Planning for a Conversation section.

**Rating scale**

|  |  |  |  |
| --- | --- | --- | --- |
| ↑ = Consistent | → = Somewhat consistent | ↓ = Inconsistent | ? = Not sure |

|  |  |  |
| --- | --- | --- |
| **Employee-Specific Goals** | **Rating** | **Comments** |
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|  |  |  |

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| --- | --- | --- |
| **Values/Behaviors** | **Rating** | **Comments** |
| [VALUE] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| [VALUE] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| [VALUE] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| [VALUE] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| [VALUE] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |
| 1. [Behavior] |  |  |

**Planning for the conversation (manager use only)**

|  |  |
| --- | --- |
| **“First I want to recognize a behavior (or two) that you’re doing consistently.”** | |
| Behavior(s): | Why the behavior is important: |
| Specific example of doing the behavior(s) well: |
| **“Next, let’s review a behavior (or two) that I believe you could do more.”** | |
| Behavior(s): | Why the behavior is important: |
| Specific instance when the behavior(s) could have been done: |
| **(Optional: Applies to self-assessment only) “I was surprised to see how you rated these behaviors, as I think you do these well.”** | |
| Behavior(s): | Why the behavior is important: |
| Specific example of doing the behavior(s) well: |
| **Specific employee next steps** | |
|  | |