

TIPS FOR EFFECTIVE CONVERSATIONS AND DOCUMENTATION

Effective conversations build strong relationships. Effective documentation protects those relationships.

Preparing for a Successful Conversation

Effective conversations begin with preparation.

Five Essential Elements of Effective Conversations

1. **Clarity** – Be specific about the behavior or issue you are addressing. Make sure everyone understands the meeting’s purpose.
2. **Objectivity** – Stick to what you have personally observed (not second-hand information). Have examples or data for the issue at hand – who, what, when, where.
3. **Two-way Dialogue** – Invite the employee to respond. Ask open-ended questions and then actively listen in order to understand the employee’s perspective.
4. **Set Expectations** – Agree on what success looks like. Collaboratively agree on when and how progress will be checked. Provide clear expectations or policy references related to the issue.
5. **Create a Plan** – Close the conversation with shared next steps. Confirm the employees’ understanding of these steps and make sure to follow-through on your part of the plan.

Creating Successful Documentation

Documentation isn’t just about paperwork; it is about clarity and consistency.

Five Best Practices in Documentation

1. **Record Key Points Promptly** - Details need to be accurate. Document as soon as possible after the conversation.
2. **Capture the Facts** - Include what happened, when, and what was agreed. Include dates, times, and concrete examples. Include what you said, what the employee said, and any agreed upon steps.
3. **Use Consistent Structure** – A simple template or framework works well.
4. **Keep it Objective** – Avoid opinions and subjective language. Focusing on actions and facts.
5. **Store it Accessibly** – Documentation needs to be easily referenced.

Note: Supervisors should verify employees understand expectations, allow time for training opportunities, and provide adequate support resources. Doing this proactively can help prevent job performance issues.