Toolkit for Managing Remote Teams - Resources for Working Remotely

Contents

JHU Resources:

[Working from Home Support (JHU Tools and Guidance included)](#)

[JHU IT Resources](#) – A chart that shows what kind of remote access you need to access various university systems

[Organization Development & Effectiveness](#)

[Johns Hopkins Resources](#)

Articles on Working Remotely

[15 Questions About Remote Work, Answered](#) – Harvard Business Review; Q & A article on how to work productively at home, manage virtual meetings, and lead teams through the coronavirus crisis.

[Coronavirus: How to Succeed At Video-Conferencing](#) – Forbes; a concise guide to deliver impeccable presentations via video-conferencing.

[What it Takes to Run a Great Virtual Meeting](#) – Harvard Business Review; provides 12 basic virtual meeting best practices.

[A Guide to Managing Your (Newly) Remote Workers](#) – Harvard Business Review; provides information on improving engagement and productivity of remote employees during the Covid-19 pandemic.

[How to Get People to Actually Participate in Virtual Meetings](#) – Harvard Business Review; provides tips on [structuring virtual meetings to fully engage attendees.](#)

[The Sensitive Leader's Guide To Managing a Remote Team During The Coronavirus Pandemic](#) – Forbes; offers tips for setting up team structure, direction, and support.

[The Art of Working Remotely: How to Ensure Productivity](#) – Forbes; tips to stay productive while working remotely for the first time.

[Virtual Meetings Don't Have to Be a Bore](#) – Harvard Business Review; provides tips for making the most of a meeting format that you might not be comfortable with yet.

[7 Essential Tips for Working From Home During the Coronavirus Pandemic](#) – The Muse; provides tips on how to adjust to the remote work lifestyle

[Patrick Lencioni: 3 Thoughts for Leaders In a Perilous Time](#) - Chief Executive; how to show up as a leader during this challenging time

[23 Essential Tips for Working Remotely](#) – Inc.; tips on how to keep the team's morality and productivity high while remote

[How to Quickly Build Trust in a Meeting with One Word](#) – The Get Real Project; the value of asking your team to summarize their feelings/emotions/experience in a one-word check-in or check-out question

[Stay productive while working remotely (with Microsoft Teams)](#) - Microsoft; shares tips on how to use Microsoft Teams to collaborate while working remotely

[These Four Techniques Will Instantly Improve Your Videoconferences With Remote Employees](#) – Forbes; tips on how to improve your videoconferencing experience while remote

Articles on Working from Home (Parents):

[A Guide for Working (From Home) Parents](#) – Harvard Business Review; offers parents three steps to bring your old plan into your new normal during the pandemic.

[Coronavirus: 5 Ways to work from home with you kids (and stay sane)](#) – World Economic Forum; presents tips on how to find perspective and a sense of balance when working from home and balance the demands of work and family.

[How Working Parent Can Prepare for Coronavirus Closures](#) – Harvard Business Review; presents guidelines to manage work and kids, with potential school and daycare closures.

[Working From Home with Kids: 21 Tips From Our Remote Team](#) – From Buffer, open blog, offers helpful tips for parents who are working at home while caring for children.

Articles on Feedback

[5 Tips for Providing Feedback to Remote Workers](#) – Remote Companies

[6 Key Skills You Need for Virtual Group Coaching Conversations](#) – The Coaching Tools Company

[How to Give Feedback to Remote Workers](#) – Medium

[How to provide effective feedback for remote employees](#) – Idealog

[The Key to Immediately Improve Your Talent Development](#) – article from Center for Creative Leadership on feedback.

LinkedIn Learning Videos:

[Giving and receiving feedback virtually](#) – Part of the *Working Remotely Course*; learn how to work remotely, use feedback, and remain connected.

[Working Remotely](#) – Full course covers topics such as setting yourself up for success, working with your team, and most common challenges.

[Remote workers are the future of business](#) – Covers remote leadership basics and getting results at a distance.

[Remote Coaching and Feedback](#) – Part of the *Leading at a Distance* course; provides tips for coaching remote team members more effectively.

[Leading at a Distance](#) – Full course covers topics such as remote leadership basics, getting results at a distance, engaging others at a distance, and understanding ourselves as remote leaders.

[Performance and Virtual Teams](#) – Part of *The Future of Performance Management* course; provides tips on establishing trust through team performance design.

[Providing feedback to a remote worker](#) – Part of *Managing Virtual Teams* course; provides considerations for intentionally providing feedback for remote workers.

[Managing People at a Distance](#) – Part of the *Managing Virtual Teams* course; tips on providing consistency and structure in a virtual team.

Activity Templates

Shifting to Remote Work – Roles Outcomes Template

Use the table below to list all job roles that report to you, and the associated outcomes. Remember, the outcomes are the end result of a task or process. Feel free to add columns/rows to this table as needed.

Example: Administrative Coordinator			
An up-to-date schedule of meetings			
A designee's reimbursements submitted			
A designee's travel arranged			
Office supplies stocked			
Support documents created for work			
A planned event			

Shifting to Remote Work – Access Required Template

Use the table below, to determine what access is required. Feel free to add columns/rows for your use.

Job Role	Role Outcomes	Access Required to Perform	Obtain Access Remotely?

Shifting to Remote Work – Tools and Access Template

Based on your previous work with job roles and access, create a list of all the tools and access your team needs. Here is the link to the JH IT page to get you started if items need to be ordered or access requested.

Employee Name	Technology Needed?	Remote Access Needed?
Jane Doe	Laptop, Docking station, Monitor	VPN, Authenticator, Zoom account

Changing Role Expectations – Technical Expectations

Use this blank template to think through if technical expectations are changing for each of your job roles.

Job Role	Job Role Outcomes	Current Technical Expectations	New Technical Expectations
		☐	☐

Our Remote Work STRATEGIC Core

Record your group's final vision, mission, strategic goals, objectives, measures of success / key results, and timelines / key deadlines, and share the document with everyone in the team. Make sure everyone has a shared understanding of all the elements and are kept updated of any changes.

Element	Description
Vision	
Mission	
Strategic goals	
Objectives	
Measures of success/ key results	
Timelines / key deadlines	

Our Remote Work PROCESS Core

Record your responses to each of the elements below and share the document with everyone in the team. Make sure everyone has a shared understanding of all the elements and are kept updated of any changes.

Element	Description
Team structure, roles, and responsibilities	
Decision-making process	
Values, norms, and guiding principles	
Conflict resolution	
Accountability mechanisms	
Communications	
Appreciation and recognition	

Giving and Receiving Feedback - Using Job Outcomes or Goals

Use this blank template to think through if employees are completing the new technical expectations for each job role.

Job Role	New Technical Expectations	Is the Employee Completing New Job Outcomes?	
		Yes	No

Feedback Conversations

Feedback can open opportunities for both personal and professional growth and development.   When done well, those receiving feedback are more likely to listen non-defensively and use the information to adjust behaviors and/or develop skills.

Feedback provides employees information on:

- ✓ What is working
- ✓ What is not working
- ✓ How to improve and achieve desired results

In order for feedback to be effect, the information needs to be delivered in a way that it can be heard and utilized. Feedback is often avoided because those giving, receiving, and requesting feedback often feel awkward and vulnerable. If you have not had a lot of feedback conversations with your employees prior to work remotely, they may start out as feeling "transactional," but each feedback conversation you hold is an opportunity to inspire and build trust.

This resource can be used to increase your knowledge and understanding of giving and receiving feedback and covers:

- ➢ Definition of Feedback
- ➢ Benefits of Feedback
- ➢ Self-evaluation
  - o Why do you avoid giving feedback?
  - o What is your comfort and skill level in giving feedback?
- ➢ Feedback and Employee Development
- ➢ Using the Situation, Behavior, Impact feedback model
- ➢ Addressing common reactions to constructive feedback
- ➢ Additional Resources (myLearning resources)

Defining Feedback

Ongoing communication that confirms or validates appropriate behaviors and good performance and provides guidance or correction for behaviors and performance that do not meet expectations, in a way that maintains relationships and helps to improve performance.

Benefits of Feedback

- Teaches how individuals affect his or her world
- Teaches how others see them
- Gets to the point without wasting time
- Facilitates cooperation and the free flow of information
- Can eliminate divisions between people
- Directly links to employee development

Why do you avoid giving feedback?

Self-evaluation

There are many reason supervisors give for not giving feedback. Check any of the following reasons that describe why you avoid giving feedback:

I avoid giving feedback because:

- ☐ 1. I don't have time.

- ☐ 2. I don't know how to give feedback.

- ☐ 3. I don't want to demotivate my employee.

- ☐ 4. It feels awkward.

- ☐ 5. I never received feedback and was able to figure it out.

- ☐ 6. I have too many employees reporting to me.

- ☐ 7. I wasn't clear with the employee about setting goals and performance expectations.

- ☐ 8. I have tried giving feedback in the past and it has not helped.

- ☐ 9. The employee knows what to work on.

- ☐ 10. The employee is already a top performer.

- ☐ 11. The employee may get defensive.

- ☐ 12. I may feel intimidated by the employee's reaction.

- ☐ 13. The employee is engaged and motivated and doesn't need feedback.

- ☐ 14. The employee needs more time to get acclimated and learn the job.

- ☐ 15. I have trouble controlling my emotions when questioned about providing specific examples of performance issues.

- ☐ 16. I don't care if the employee is developed.

- ☐ 17. I don't like conflict.

- ☐ 18. I don't have faith that the employee can improve.

- ☐ 19. Employees are responsible for their own development.

- ☐ 20. I don't want to damage our relationship.

Reasons You Should give feedback

For each item you checked on the previous page, review and consider the reasons you should give feedback and suggestions to improve your approach.

☐ 1. **I don't have time.**

Reason to give feedback: Employees want and need feedback to grow and develop. Having short, regular, and frequent 1:1 meetings with each team member allows you to get to know them, find out what's important to them, discuss progress and barriers, and build trusting relationships. It's better to take the time to provide feedback and support; this helps to prevent small performance issues from becoming larger and more complicated. If not addressed, individual issues can become team issues and negatively impact morale.

☐ 2. **I don't know how to give feedback.**

Reason to give feedback: The university provides a variety of professional development courses and resources to improve your feedback and management skills. After learning the basics, you will need to practice and apply your skills to increase your confidence and skill level.

☐ 3. **I don't want to demotivate my employee.**

Reason to give feedback: By giving balanced feedback on the areas that are going well and areas of concern, you will help your employee to improve and become even more productive. The feedback and support you give employees can positively impact their performance by clarifying expectations, acknowledging them for their strengths, and empowering them to close skill gaps.

☐ 4. **It feels awkward.**

Reason to give feedback: It's understandable that giving feedback can feel awkward, especially if you've not given feedback before or haven't been the recipient of helpful feedback in the past. Just like with anything new, the more you learn about giving feedback and participate in feedback conversations, the more comfortable and confident you'll be with your new skills.

☐ 5. **I never received feedback and was able to figure it out.**

Reason to give feedback: Your success as a manager is directly tied to the success of your employees. While many employees can and do figure things out, it isn't the most effective approach. Employees have a better chance of achieving desired results and developing new skills quickly, when they're guided and supported by their managers. Creating a partnership and having frequent feedback sessions with your employees helps to ensure they're focusing on the right things, accomplishing goals, and progressing with their development.

☐ 6. **I have too many employees reporting to me.**

Reason to give feedback: Having a lot of direct reports can be challenging, but part of your role as a manager is to develop and provide feedback to your direct reports. Feedback can be given both formally or informally, but having regularly scheduled 1:1s and a standard format for your feedback sessions can help you better manage your time. Typical topics covered in 1:1 meetings includes: progress on goals/development, things that are going well, areas of concern, and career management.

☐ 7. ***I wasn't clear with the employee about setting goals and performance expectations.***

Reason to give feedback: While it's best to set clear goals and expectations at the beginning of the performance cycle, updates can be made at any point. Clarifying expectations with those who are now working remotely, can help employees to focus on the things that will have the greatest impact and ensures there won't be any surprises around job outcomes.

☐ 8. **I have tried giving feedback in the past and it has not helped.**

Reason to give feedback: If you've attempted giving feedback in the past that hasn't been effective, it may mean the feedback was unclear or presented in a way that made it difficult to hear. Try sharing your thoughts, observations, and feelings more often. Be clear about the purpose of the feedback and provide specific examples of what the employee does well and what needs to improve. Use open-ended questions to determine if the employee's perspective is the same as yours. Invite the employee to brainstorm strategies to use in the future. Before ending the feedback session, make sure there is a clear plan about what needs to be achieved and what measures will be used to measure progress before your next 1:1 or check-in.

☐ 9. **The employee knows what to work on.**

Reason to give feedback: Employees may know what to work on, but your feedback, advice, and guidance may be needed to help them be more efficient and productive. If your employees are highly successful, praise and acknowledgement can help them to feel valued and respected for what they're accomplishing and helps to increase employee engagement. Ongoing feedback also ensures there won't be any surprises for anyone, when deadlines approach or at the end of the cycle.

☐ 10**. The employee is already a top performer**.

Reason to give feedback: Everyone needs feedback, even top performers. Feedback helps all employees stay focused, motivated, challenged, and engaged. While your top performing employees may have mastered what's required for their current positions and are achieving results, your feedback could assist them to develop skills to prepare for the next level. Before giving feedback, ask your top performing employees *how* they are achieving results. Your top performers may be so focused on the drive for results that appropriate concern for colleagues, teammates, or direct reports is neglected. Assess if the strengths that are enabling success might be overused. As with all employees, your feedback should focus on current performance, progress on goals/development, things that are going well, areas of concern, and future career goals and aspirations.

☐ 11. **The employee may get defensive.**

Reason to give feedback: Fear of how an employee will respond to feedback is one of the top reasons managers avoid or delay giving feedback. An employee may become defensive when feedback sounds like criticism, fault-finding or disciplinary, especially if it is the first time the employee is hearing the information. When employees are confronted about poor performance, it may trigger feelings of self-doubt, mistrust, and insecurity.

A more effective approach is to focus on the positive desired performance rather than highlighting shortcomings. Managers should define the positive performance in specific terms and detail the benefits for making the change.

For example, for an employee who lacks professionalism when interacting with clients, the manager might say:

"I'd like to see you develop a more polished and professional approach when you're working with clients. What I mean by this is when you meet with clients, I want you to wear a suit, be on time to meetings, be reliable with your word and work product, and accurately describe deliverables. The reason I'm asking you to focus on this, is I believe these things will increase the number of positive client interactions you have and your client will have more confidence in your ability to produce results for them."

☐ 12**. I may feel intimidated by the employee's reaction.**

Reason to give feedback: Understanding possible employee reactions to feedback and how to handle them will make you better equipped to provide any type of feedback. You can reduce the number of negative reactions by using precise, accurate language and specific examples to support the feedback. Allow the employee to speak openly, observe signs of emotional reactions, and remain calm and composed. You can learn more about how to address negative employee reactions to feedback through a variety of professional development courses and resources offered by the university.

☐ 13. **The employee is engaged and motivated and doesn't need feedback.**

Reason to give feedback: Don't take engaged and motivated employees for granted. While many employees are intrinsically motivated, research has shown one of the top reasons employees leave an employer is because of the relationship with the manager. Having frequent conversations can head off potential retention issues including the employee feeling undervalued and having stunted growth and development.

☐ 14. **The employee needs more time to get acclimated and learn the job.**

Reason to give feedback: Employees who are new to the organization or role need more frequent feedback and guidance to support them as they get acclimated to their new positions. While it may take time for new employees to reach their full level of productivity, clarifying performance expectations from the beginning helps them to know what to strive for and focus on during the introductory period. The introductory period sets the tone for the working relationship between the manager and employee; having feedback conversations from the start of the relationship gets both of you in the habit of talking about performance.

☐ 15. **I have trouble controlling my emotions when questioned about providing specific examples of performance issues.**

Reason to give feedback: If you will be providing feedback on performance issues, you should be prepared with specific examples prior to having a feedback session. Providing factual data helps the employee to see the feedback is objective and not based on your personal opinion. If you or the employee get too emotional to continue a productive discussion, acknowledge the emotions and tell the employee you will continue the discussion when you or the employee is feeling less reactive. Remember, the goal is to provide feedback the employee can hear and use; the collaborative discussion should be solution oriented and not punitive. Using the Situation, Behavior, Impact Feedback model can help you and the employee have more productive feedback conversations.

☐ 16. **I don't care if the employee is developed.**

Reason to give feedback: Consider your employee's success as your own success. Employees who receive feedback and are developed are more likely to be successful. An important part of your role as a manager is to monitor performance and develop your direct reports. Your own performance evaluation may suffer if you are not fulfilling that important part of your role.

☐ 17. **I don't like conflict.**

Reason to give feedback: Giving feedback does not necessarily mean the conversation will end in conflict. Many times our own negative experiences of receiving feedback impact our own perspective on giving and receiving feedback. The goal of feedback is to support the employee to become more responsible, effective, productive, creative and successful. We all have areas we need to improve upon – the information you provide may assist the employee to improve and excel.

☐ 18. **I don't have faith that the employee can improve.**

Reason to give feedback: Your expectations for your employees largely impacts their performance outcomes. [The Pygmalion Effect: How It Drives Employees Performance](), in the *Harvard Business Review* in 2014, illustrates the way managers treat their employees is subtly influenced by what they expect of them. Managers communicate expectations consciously or unconsciously. Employees pick up on these expectations, either consciously or unconsciously. Employees will then perform in ways that are consistent with those expectations.

In contrast, those managers who believe employees can succeed and assists employees to believe in themselves, can help employees exceed their own expectations. What the manager believes can become a self-fulfilling prophecy.

When you express your faith in the abilities of your employees, their morale, self-esteem, and performance can increase. Encourage employees by providing opportunities for success and development before increasing the level of challenge of assignments. Hold frequent, positive, coaching sessions that reinforce your commitment to the employee's success and emphasize your believe in the employee's ability.

☐ 19. **Employees are responsible for their own development.**

Reason to give feedback: Employees do play an important part in their own development and are responsible for taking advantage of the opportunities the employer provides. As a manager, you will help your employees focus on meaningful development opportunities based on needs for each of them. Employees may not be aware of their own development needs and can benefit from your advice and guidance.

☐ 20. **I don't want to damage our relationship.**

Reason to give feedback: Feedback can be used to strengthen and build trust in an existing or forming relationship when you and the employee have shared expectations for the experience. Set the stage at the beginning of the cycle to indicate you will be giving focus to those thing that are done well and those things that need improvement. Positively describe the result that you want and approach feedback sessions as solutions-focused. Employees will be more receptive to feedback if they view you as a partner that supports their success.

What is your comfort and skill level in giving feedback?

Feedback and Employee Development

Managers who are effective at developing employees invest time and resources into building their capabilities. Feedback and development provide employees with guidance and support, so they can effectively do the duties of their current position and help them to prepare for future opportunities.

For the following items, please place a check next to the feedback items that most closely describe you:

- ☐ I tell employees when they are being successful in their roles.

- ☐ I provide challenging stretch assignments that capitalize on employee's strengths.

- ☐ I hold development discussions at least two times per year with each employee.

- ☐ I am aware of each of my employee's career goals.

- ☐ I believe employee development is a priority.

- ☐ I use a variety of methods to develop employees (On the job experience, feedback from others on a specific task/skill, and training.)

- ☐ I give frequent in-the-moment feedback to reinforce and develop new skills and behaviors.

- ☐ I assist employees in developing and executing compelling development plans each year.

- ☐ I provide the employee with the appropriate training and resources to effectively do the job.

- ☐ I ask for and listen to employee ideas about their own development.

- ☐ I recognize employees when they deserve

- ☐ I am realistic about how much people can grow.

- ☐ I encourage employees to develop and grow into bigger or different roles, even if it mean losing a good employee to a difference part of the organization.

- ☐ I tailor development opportunities to each person's unique needs.

- ☐ I delegate real, challenging work that employees have not done before to encourage growth.

- ☐ I encourage employees to have tenacity and perseverance when approaching challenging development opportunities.

- ☐ I am personally committed to actively supporting continuous employee improvement.

- ☐ I see long-term staff development as part of my job.

- ☐ I hold career coaching discussions with each employee at least once a year.

- ☐ I support the employee when taking risks.

- ☐ I consider the employee's interests, skills, and values when delegating work and designing development opportunities.

Using the Situation, Behavior, Impact Feedback Model

The Situation, Behavior, Impact model can be used for giving both positive and negative feedback.

	Situation	
S	Describe the situation. Be specific about when and where it occurred.	
	Behavior	
B	Describe the actual, observable behavior. Stick to the facts, don't insert opinions or judgements. Don't assume you know what the other person was thinking.	
	Impact	
I	Describe what you thought or felt in reaction to the behavior.	

The Key to Immediately Improve Your Talent Development – article from Center for Creative Leadership on feedback.

How Can You Use SBI-I to Give Feedback?- article from Center for Creative Leadership on feedback.

Situation	
Describe the situation. Be specific about when and where it occurred.	
Behavior	
Describe the observable behavior. Don't assume you know what the other person was thinking.	
Result	
Describe what you thought or felt in reaction to the behavior.	

The Three Conversations

	A Battle of Messages	A Learning Conversation
The "What Happened?" Conversation **Challenge:** The issue is more complex than either person can see.	**Assumption:** I know all I need to know to understand what happened. **Goal:** Persuade her I'm right	**Assumption:** Each of us in bringing different information and perception to the table; there are likely to be important things that each of us doesn't know. **Goal:** To explore each other's stories – how we understand the situation and why.
	Assumption: I know what she intended. **Goal:** Let her know what she did was wrong.	**Assumption:** I know what I intended, and the impact her actions had on me. I don't and can't know what's in her head. **Goal:** Share the impact on me, and find out what she was thinking. Also find out what impact I'm having on her.
	Assumption: It's all her fault, or it's all my fault. **Goal:** Get her to admit blame and take responsibility for making amends.	**Assumption:** We have probably both contributed to this situation. **Goal:** Understand the contribution system: how our actions interact to produce this result.
The Feelings Conversation **Challenge:** The situation is emotionally charged.	**Assumption:** Feelings are irrelevant and wouldn't be helpful to share, or, my feelings are her fault and she needs to hear about them. **Goal:** Avoid talking about it, or let her have it!	**Assumption:** Feelings are at the heart of this situation. Feelings are usually complex. I may have to dig a bit to understand my feelings. **Goal:** Address feelings (mine and hers) without judgments or attributions. Acknowledge feelings before problem-solving.
The Identity Conversation **Challenge:** The situation threatens our identity.	Assumption: I'm competent or incompetent, good or bad, lovable or unlovable – there's no in-between. Goal: Protect my all-or-nothing self-image.	**Assumption:** There may be a lot at stake psychologically for both of us. Each of us is complex, neither of us is perfect. **Goal:** Understand the identity issues on the line for each of us. Build a more complex self-image to better maintain my balance.

Adapted from: Douglas Stone, Bruce Patton and Sheila Heen. Difficult Conversations, 1999.

Curiosity and Active Listening

Listening is a critical skill for obtaining information, understanding others, and learning. Active listening is a method in which we consciously make an effort to be curious and not only hear the words of another person, but truly understand the complete message of what is being communicated. To enhance the experience of communication, it is helpful to let the other person know you are listening and understanding what is being said.

Active listening includes:

- Validating – to acknowledge the worth of the person.
- Reflecting – to show you understand how the other person feels.
- Encouraging – to convey interest and encourage the person to talk.
- Clarifying – to help clarify what was said and to get more information.
- Restating – to show that you are listening and understanding.
- Summarizing – to pull together key points and facts to establish where to go next.

Sample statements/questions to get more information:

– I'm curious about…

– Can you help me to understand…

– It sounds like….

– What are your specific concerns?

– What's most important to you?

– Can you tell me more about the experiences you've had…

– Can you say a little more about how you see things?

– What information might you have that I don't?

– How do you see it differently?

– What impact have my actions had on you?

– Can you say a little more about why you think this is my fault?

– Were you reacting to something I did?

– How are you feeling about all of this?

– Say more about why this is important to you.

– What would it mean to you if that happened?

– I'm wondering if….

– I'm interested in hearing about….

Critical Conversations Preparation Worksheet Instructions

Each critical conversation is different and there isn't one-size-fits-all guidance that will work for every conversation. With that, there tends to be patterns to what goes wrong and things that can help. To assist you as you prepare for a conversation, consider using the worksheet to draw on some of the ideas presented in the book *Difficult Conversations*.

No amount of preparation can guarantee that the conversation will go smoothly or that you will get the outcome that you want, but most people find thinking through helps them to decide whether to have the conversation, gives ideas for how to engage in the conversation, and lowers anxiety.

1. **The "What Happened?" Conversation.** The first conversation is about the substance. Who said what, who did what? Who intended what? What did you each contribute to the problem? This section of the worksheet focuses on three main areas:
   - **Understand each other's stories.** We often get stuck thinking that our story is "right" and their story is "wrong," when in fact there is almost always some reasonable basis for both sides' stories. Explore each other's stories, instead of attacking theirs and defending yours. Your goal in each column on the worksheet is to tell the story in such a way that a friend or third party might say, "Wow, that view makes a lot of sense."

Note: As you try to do this, you'll notice yourself thinking things like, "Yeah, but they're wrong," or "That's their view, but it's not justified." Those kinds of thoughts are natural. But remember, they don't think they're wrong. Your goal is to understand their view as they understand it. Understanding their view doesn't mean you agree with it, or that you have to give up your view.

   - **Sort out contributions.** Just as it takes two to tango, most problems stem from things both sides said or did. With a few important exceptions, it is rarely helpful to assign blame for what went wrong. What is more helpful is to explore what each side contributed to the problem at hand. The purpose of exploring what each person has contributed is to better understand the past, and plan ways to change interactions the future.
   - **Disentangle intent and impact.** We are in the habit of demonizing others' intentions and sanitizing our own: "If they did something that hurt me, it's because they meant to. If I did something that hurt them, it was an unintended consequence – I had good intentions!" Instead, use this part of the worksheet to disentangle intent and impact.

2. **The Feelings Conversation.** The second conversation involves the feelings each person in the conversation is grappling with. What should you do with these feelings? Should you tell them how you feel? And what about their feelings? What if they become angry, or start to cry? What will you do then?

   - **My feelings.** Make a list of some of your feelings regarding what has happened. Common feelings include anger, frustration, hurt, shame, confusion, fear, anxiety, and loneliness. Many conversations also involve feelings that are considered positive, but which are nonetheless difficult to manage or express. These include joy, pride, and love. Which feelings are hardest for you to express, and why?
   - **Their feelings.** Make a list of what you imagine the other person might be feeling. Which of these feelings are hardest for you to hear, and why?

Note: Being aware of your feelings doesn't mean you have to express your feelings. Simply being aware of them is helpful to how you think about the situation and the conversation. If you do choose to share your feelings, be careful to express feelings and not your judgments about the other person. For example, if you feel lonely, say, "I feel lonely," instead of "Why are you so inconsiderate?" The difference between the two is crucial: the first invites conversation, the second invites an argument.

3. **The Identity Conversation.** This is the conversation you have with yourself, about yourself. It's the conversation that asks, "What does this all say about me? Am I a good person? Loveable? Competent?"

- **My self-image.** Conversations are difficult because they often threaten some part of our identity. We see ourselves as competent, generous, or fair, so anything that challenges that notion of ourselves knocks us off balance. Recognize what's at stake for you, but also "complexify" your image of yourself so that all does not hang in the balance of this one conversation (i.e. even if in this situation you have in fact behaved irresponsibly, it doesn't necessarily make you an irresponsible person. Think of other times when you have acted responsibly).
- **Their self-image.** What identity issues might you be triggering for them in the conversation? Are they reacting because they hear you calling them an incompetent professional, insensitive spouse, or bad parent?

Once you have gotten your arms around the three conversations, the last part of the preparation worksheet will help give you direction as you go into the difficult conversation.

4. **Choosing My Purposes.** Too often, we enter difficult conversations without a clear purpose, or we adopt purposes we can't control – like changing them or persuading them. Only they can decide to change or be persuaded, so this sets us up to be frustrated.

- **My purposes for having a conversation.** Make a list of those things you'd like to get out of the conversation. In doing so, consider three purposes that are helpful for almost all difficult conversations:
  - **Learning:** Listen first to understand, then to be understood. You almost never know everything you need to know about the situation. Seek out the pieces of the puzzle you don't have.
  - **Expression:** You are an unparalleled expert on you. So, speak for yourself and how you are experiencing the problem. Consider sharing your perspective, interests, feelings, and requests.
  - **Problem-Solving:** You take the lead. Once you have listened to their views and expressed your own, then you should proceed to problem solving. Ask: "Can we find a way to move forward that works for both of us?"
- **Prepare an opening line.** Think in advance about how you might begin the conversation. One useful way to go is to set forth your purposes, so you might say: "I'd like to hear your thoughts on this problem and to express my own. Then I think we should take some time to problem solve. Does that make sense to you as a way to spend the conversation?"

A final reminder: Difficult conversations will always be part of life. Even if your difficult conversation doesn't go well, you can review this worksheet and ask yourself what you might try differently next time. Many difficult conversations are held over a period of time. While there will be ups and downs, eventually – with some thought and preparation – mutual understanding often increases and some learning takes place. This gives you the best chance for relationships to deepen and for problems to be well-managed.

Adapted from TRIAD Consulting Group, 2018, www.triadconsultinggroup.com

Critical Conversations Preparation Sheet

THE "FACTS"				
Understand Each Other's Stories		**Contributions, Impacts and Intentions**		
My Story: *What are the issues from my point of view?*	**Their Story:** *What might be the issues from their point of view?*	**Their Contribution:** *How have they contributed to the current situation?*	**Impact on Me:** *What impact has this situation had on me?*	**Their Intentions:** *What might their intentions have been?*
Data?	Data?	**My Contribution:** *How have I contributed to the current situation?*	**Impact on Them:** *What impact has this situation had on them?*	**My Intentions:** *What were my intentions?*

The Feelings Conversation		The Identity Conversation		Choosing my Purpose
My Feelings: *How do I feel about this situation?*	**Their Feelings:** *What they might be feeling?* *Which Core Concerns might be implicated for them?* ☐ Autonomy ☐ Affiliation ☐ Appreciation ☐ Role ☐ Status ☐ Fairness	**My Self-Image:** *What do I fear this situation says about me?*	**Their Self-Image:** *What might this situation say about them that would be upsetting to them?*	**My Purposes for Having a Conversation:** *What do I hope to accomplish in this conversation?*
Which feelings make sense to share?	*What can I do or say to help build our relationship?*	*What's true about this?*	*What can I say or do to avoid triggering their identity?*	*What do I need to learn from them?*
		What's not?		*What do I need to share with them?*

Adapted from TRIAD Consulting Group, 2018, www.triadconsultinggroup.com

Addressing common reactions to constructive feedback

Addressing Difficult Responses to Feedback

	Difficult Response	Don't…	Do…	Example
Anger/Attack	The person becomes angry and lashes out at you	Counterattack, become defensive, or get involved in a shouting match	Acknowledge the anger and solicit the person's feedback. Also, you may need to clarify that the review process is about behaviors and results, not about the person's character.	"It sounds like you're angry about this process. Can you tell me more about why you're angry?" -or- "It sounds like you're angry about this process. I just want to emphasize that this feedback is not about evaluating your worth as a person, but about specific behaviors that have occurred and the consequences of those behaviors."
Defensiveness/ Denial	The person denies the accuracy of your observations and feedback or tries to deny its importance	Ignore the others person's viewpoint, get involved in a tit-for-tat conversation	Accept the possibility they know something you don't, and solicit specific, observable evidence. Be ready to (re)state the evidence on which you based your feedback.	"It seems like we have a different perspective here. Can you pinpoint what in my assessment you find inaccurate or unfair?"
Passing the Buck	The person blames poor performance on the lack of tools, assistance, time or other support	Ignore the complaints, or, on the other hand, let the person avoid responsibility for their performance	Acknowledge the concerns and encourage the person to focus on what he or she can control.	"It sounds like you have some frustrations, why don't we get at them now? Then we can focus on what is under your control."
Silence	The person is uninvolved in the conversation and says little or nothing.	Keep talking as if nothing is wrong.	Acknowledge the silence, express your concern, and ask for their thoughts.	"I notice you're not saying much, and I'm concerned that there's something on your mind. What can you tell me about it?"
Indifference	The person hears and understands the issues, but doesn't seem to care.	Ignore the indifference, or chastise the person for lack of commitment.	Point out the apparent indifference, and then make clear how the issue affects them, you and the team.	"I'm getting the sense this issue doesn't matter much to you. But before you reach that conclusion, let's talk about how it impacts you and the team."
Despair	The person takes the feedback very hard and feels inadequate and/or discouraged.	Ignore the person's feelings, or, on the other hand, tell them to "Buck up."	Acknowledge their frustration or sadness, and give them space to talk about it. Remind them that the feedback is about specific performance issues, not their value as a person. Look for opportunities to create small successes.	"It must be hard for you to hear this. I value your contribution, and this feedback is not meant to reflect on you as a person."

Adapted from: Coaching and Giving Assessment Feedback