



Performance Review Coaching Worksheet

“Communicating with heart is the lifeblood of outstanding patient care.”

There are a few simple guidelines, which will help you make performance reviews a rewarding experience for the receiver and performer of the review. Your role as the one performing the review should be one of a coach or steward rather than a judge. Establish a coaching atmosphere by making the experience a collaborative one. Incorporate what you have learned from Crucial Conversations training.

1. Start from your Heart. What do you really want as a result of this interaction? Think long term and for both of you.

result: _____

result: _____

result: _____

2. What are your concerns? (As you describe your concern, begin with specific Facts—not your conclusions from the facts.)

fact: _____

fact: _____

fact: _____

fact: _____

3. Which concerns will you address?

concern: _____

concern: _____

concern: _____

4. Does the concern relate to the Content of a specific incident or a Pattern of incidents?

incident: _____

incident: _____

5. Does the concern reflect on key Relationships?

example: _____

example: _____

“After you’ve described your concern—**STOP. LISTEN.** Give them a chance to explain their perspective.”

Sources:

1. Kerry Patterson et al, Crucial Conversations: Tools for talking when stakes are high. p27
2. Kerry Patterson et al, Crucial Conversations. Participants Toolkit. 2004, p15
3. Kerry Patterson, Crucial Conversations: Tools for talking when stakes are high. p105
4. Kerry Patterson, Crucial Conversations: Tools for talking when stakes are high. p114
5. Kerry Patterson, Crucial Conversations: Tools for talking when stakes are high. p91

6. Now, share your conclusions, your Story, in a tentative way. Remember, your story is just a hypothesis. So don’t treat your conclusions as if they were facts.

conclusion: _____

conclusion: _____

conclusion: _____

conclusion: _____

conclusion: _____

7. If there is a particularly concerning behavior—or pattern of behaviors—ask yourself, “Why would a reasonable, rational, and decent person do what this person is doing?” Maybe they have a good reason for their actions⁴.

8. If the person begins to get defensive, step out of the content and restore safety. **Focus on Mutual Purpose and Mutual Respect⁵**. Then step back into the content of your concern. Don’t water down your content⁵.

9. Know ahead of time what you want to communicate with respect to expectations.

expectation: _____

expectation: _____

expectation: _____

expectation: _____

10. Incorporate the provider’s own goals with regards to behaviors

11. If you uncover a problem behind a behavior, you may not need to solve it, but you are expected to be familiar with resources (e.g. EAP or HR.) If the system could be changed to support the provider that may be something you can help the provider change.

12. Be prepared: If there is data to be reviewed, distribute it ahead of time to the provider and know the data yourself.

13. End with a specific action plan, which comes from the provider’s knowledge of how they might best obtain goals, you have mutually set.

Remember to Coach not Judge.

