### Phase I Setting: Self-Evaluation

<table>
<thead>
<tr>
<th>Preparation</th>
<th>COMPLETED?</th>
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<tbody>
<tr>
<td>Is the setting conducive to the conversation that we need to have?</td>
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<tr>
<td>How does this feedback benefit the employee? Provide feedback that will help the employee? Can I speak with assurance? (what to say, how to say it, and admit what I don’t know)</td>
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<tr>
<td>Am I emotionally and spiritually able to have a Crucial Conversation with the employee?</td>
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<tr>
<td>Have I identified and planned for areas of possible disagreement during the review? How can I foster an open and positive discussion? How can I make employees feel comfortable during the feedback discussion?</td>
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<tr>
<td>Have I requested feedback for my direct reports from other sources (e.g., peers, internal customers) to ensure I have a complete picture of their performance?</td>
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<td>Have I identified performance strengths and examples that demonstrate these strengths? Can I describe the impact of those behaviors on the department?</td>
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<tr>
<td>Have I pinpointed the one or two areas of performance weakness that I will address in this review? Is the employee’s performance issue a part of a pattern in his or her performance levels?</td>
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<tr>
<td>Have I identified concrete examples that demonstrate the impact of these performance weaknesses? Can I describe the impact of those behaviors on the department?</td>
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<td>Have I identified possible action steps that the employee and I can take to help close any development gaps?</td>
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<td>Have I created an outline of talking points where the bulk of the review is on strengths, and any weaknesses are put into context?</td>
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<tr>
<td>Have I ensured that I have a plan for next steps (e.g., timeline for creating a development plan)? What tangible next steps can I provide to the employee to address the performance weakness?</td>
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<td>Have I clearly identified performance expectations for the next review cycle or set up a time to discuss them in the near future?</td>
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<tr>
<td>How can I motivate the employee to avoid future mistakes? What is the outcome if the employee changes his or her behavior? How can the employee use his or her personality strengths to improve performance weaknesses?</td>
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<tr>
<th>Considerations</th>
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<tr>
<td>Have I allowed the employee to discuss his or her performance weaknesses with me? Have I allowed the employee to give his or her perspective?</td>
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<td>Have I listened to the employee’s perspective and incorporated it into my analysis of the situation?</td>
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<tr>
<td>Have I worked with the employee to identify next steps for resolving consequences of mistakes?</td>
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