Manage a Challenging Conversation - a 3 Step Process

Prepare
- Good preparation is the key to success
- Take time to prepare
- Ensure you have all the information you will need
- Use all the support available to you

Discuss
1. Introduction - set the right tone
- Begin the conversation by explaining the purpose of the meeting
- Set out the structure of the meeting and that you will be taking notes
- Agree standards of behaviour required during the meeting
- Adopt a calm, sensitive and professional manner
- Reassure them about confidentiality

2. State what the issues are and give evidence
- Tell them what the problem is using your knowledge of the situation
- Give specific examples and refer to dates, documents, work or specific interactions
- Explain the gap between the expected standards/behaviours and current
- Explain the impact the problem is having on the individual, the team and the University

3. Discuss - explore to understand
- Ask for an explanation
- Listen to what they have to say
- Ask open and probing questions
- Keep an open mind and don’t jump to conclusions
- Acknowledge their position and any mitigating circumstances
- Explore issues together

4. Agree a way forward
- Ask the employee for proposals to resolve the situation
- Discuss the options, check for understanding
- Make a decision about the best solution and agree objectives, actions and timescales
- Record agreed actions and arrange a follow up meeting

Action
- Monitor and feedback on progress at follow up meetings
- Continue to provide support agreed, including training opportunities
- If the problem is not resolved:
  - Consider other options open to you
  - Seek guidance and support from others, including HR
  - Escalate to a formal process if appropriate