



▶ Participant Material

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Discussion Planner

Discussion with: _____ Date: _____

Topic/Issue to discuss: _____

▶ Key Principles (to meet personal needs)

- **Esteem**
 - Be specific and sincere
 - Express confidence and recognize efforts
- **Empathy**
 - Describe facts and feelings
 - Acknowledge progress and results
- **Involvement**
 - Unleash ideas with questions
 - Seek input on goals/progress
- **Share**
 - Disclose feelings and insights to build trust
 - Share rationale for goals/data
- **Support**
 - Specify the level of support you'll provide
 - Provide ongoing feedback and coaching

My Approach

What challenges am I expecting during this discussion? How will I address them?

▶ Interaction Guidelines (to meet practical needs)

Time

1. OPEN

- Describe purpose of discussion
- Identify importance

- Make procedural suggestions
- Check for understanding

Setting Goals What will I say to begin the discussion and encourage the direct report to lead it? Which Key Principles will I use?

Reviewing Results What will I say to begin the discussion and encourage the direct report to lead it? Which Key Principles will I use?

Time

2. CLARIFY

- Seek and share information about the situation
- Seek issues and concerns

- Make procedural suggestions
- Check for understanding

Setting Goals What will I say to seek the direct report's perspective on the goals? Which Key Principles will I use when discussing concerns?

Reviewing Results How will I encourage the direct report to be the first to share performance data/outcomes? What data will I share?



HPYN



Time

3. DEVELOP

- Seek and discuss ideas
- Explore needed resources/support

- Make procedural suggestions
- Check for understanding

Setting Goals *What will I say to encourage discussion of each goal as well as how to track it? What resources or support will I recommend/offer?*

Reviewing Results *How will I encourage the person to share ideas for achieving results? What additional resources or support will I recommend/offer to sustain or accelerate progress?*

Time

4. AGREE

- Specify actions, including contingency plans
- Confirm how to track progress and measure results

- Make procedural suggestions
- Check for understanding

Setting Goals *How will I ensure the direct report understands and agrees on each goal? What will I say to confirm tracking methods?*

Reviewing Results *What will I say to help reach agreement on the level of performance? What will I say or do to confirm we agree?*

Time

5. CLOSE

- Highlight important features of plan
- Confirm confidence and commitment

- Make procedural suggestions
- Check for understanding

Setting Goals *Which Key Principles will I use to confirm the person's confidence and commitment? What date will I recommend for reviewing results?*

Reviewing Results *What will I say to highlight the person's accomplishments? What follow-up is necessary?*

► Post-Discussion Notes

- What did I say or do to use the skills effectively?
- What could I say or do to use the skills effectively next time?