Missed-expectation conversation guide

Most misses are a system problem wearing a person's name. Find the system first, then talk about the person.

Work or task

Shift handoff for an open material issue

Conversation date

Sample day 1

1 What happened

Describe what you observed, when it happened and the evidence. Leave assumptions out.

At shift change, the open material issue was missing from the handoff sheet. The incoming operator could not find its status when starting the next shift.

2 What was expected

What result was expected? When was it explained? Ask the person to restate it.

Standard was covered at orientation: log open issues and hand off before leaving. The operator restated the verbal step; the written step had not been practiced or checked.

3 Why it matters

Who was affected next? Name the effect on their work, quality, timing or safety.

The incoming operator spent 20 minutes finding the status. The line restarted late, and the next person had to recover information that should have been ready.

4 Hear their view

Ask: What happened from your side? What did you understand? What got in the way?

"I mentioned it to a coworker and thought that was enough. I had not used the sheet and did not know who to call when the incoming operator was late."

5 Check what contributed

Check expectations, training or practice, resources, the work system and behavior.

Expectation: written step unclear. Training: no practice. Resources: sheet available. System: no late-relief backup. Behavior: operator left without confirming receipt.

6 Agree the improvement and support

What will the person change? What will the supervisor provide? Name owners and dates.

Operator: complete the sheet and confirm receipt before leaving each shift; call the shift lead if relief is late. Shift lead: demonstrate the sheet, watch a practice handoff and name the backup before the next shift.

7 Check back

Set a review date and owner. What will show improvement? What if the miss continues?

Shift lead checks the next 5 handoffs with both operators. Success: open issues logged and received, with no avoidable status search. Review after shift 5; adjust support if a gap remains.

Address the miss promptly. Ignoring it devalues the people who meet expectations.
Listen before deciding. Keep notes about the work; leave sensitive personal details out.
Print it or type in it. Keep notes short so they print in full.
If it is a safety or conduct issue, stop here and follow your site's process.

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