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

Conversation date

1 What happened

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

2 What was expected

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

3 Why it matters

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

4 Hear their view

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

5 Check what contributed

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

6 Agree the improvement and support

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

7 Check back

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

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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