



Having Meaningful Conversations with Your Employees

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Increase Performance While Improving Lives



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“Having Meaningful Conversations with Your Employees” discussed in this presentation is the current version with effective date of 2/15/22.

The comments today are my own and not necessarily those of Vizo Financial or the Vizo Financial membership.

The New Way of Work

The Past

- My Paycheck
- My Satisfaction
- My Boss
- My Annual Review
- My Weakness
- My Job

The Future

- My Purpose
- My Development
- My Coach
- My Ongoing Conversations
- My Strengths
- My Life

Source: Gallup

What's Meaningful?

A meaningful conversation is one which focuses on either:

- Needs – Am I helping someone feel comfortable?
- Development – Am I helping someone improve?
- Performance – Am I helping someone succeed?

Meeting Cadence

Great managers use meetings as a tool to translate the credit union's culture, inspire others, build relationships, and increase performance.

- Weekly Team Meetings
- Weekly Check Ins (Individual)
- Monthly Dialogues (Individual)

Weekly Team Meeting Sample Agenda Items:

- Culture Story – Share a positive story which illustrates the credit union’s culture.
- Credit Union Information – What’s happening in the credit union that everyone needs to know?
- Team Performance – Let’s discuss how we are doing in pursuit of our goals.
- Offer of Support – Who on the team needs help?
- Credit Union Support – Is there another team/person who we might be able to support?
- Old Business – Are there any outstanding items from last week which we need to discuss?
- Praise Attack – Briefly bring a colleague from another team into the meeting to offer recognition.
- Priorities for the Week – Who will do what by when?

Team Meeting Thoughts

- Manage the Agenda – Have fewer topics with more conversation
- Facilitate don't Dominate
- Involve Everyone
- Rotate Meeting Leadership

Weekly Check In

- Brief
- Performance Related
- Performance Coaching and Support

Monthly Dialogue Sample Agenda

- What's on your mind?
- Performance – How are you progressing on your objectives?
How can I support you?
- Development – What is one thing you want to learn that will have the biggest impact on your growth?
- Strengths – In the last month, what was your greatest success?
- Motivation – What's the most motivating part of your job?

Conversational Pitfalls

- There Are Too Few Questions – Track your statement to question ratio.
- It's a “Check the Box” Activity – How are you being when you're doing this?
- It's Too Rushed – Slow it down and be curious.

A Leader's Duty

Helping people get better in some way because they work with you...You have a significant impact on people's lives!

Thank You

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