



# Team FOSTER STRATEGY<sup>LLC</sup>

## Quarterly Conversation Notes

Employee		Year	
Position		Quarter	

This document is to be used as the Boss's "Notes" only. It should be used as an Accountability Tool. This is not an Evaluation Tool. Do not place in the Employee File. Refer to this document in future one-to-one meetings and Quarterly Conversations.

### Employee: What's Working?

What's going well? Discuss accomplishments, tasks, or procedures.

- ∇ What accomplishment are you most proud of last quarter?
- ∇ How did you accomplish this?
- ∇ What process(es) or procedure(s) worked well?
- ∇ What obstacles did you overcome?
- ∇ Who was most helpful?
- ∇ Do you feel you are working on things that really matter?
- ∇ Do you feel appreciated?
- ∇ Did you have the resources you needed?
- ∇ Were my expectations clear?

### Boss: Response

Recognize and thank the employee for accomplishments, behaviors, and progress.

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## Employee: What's Not Working?

What's not going well? Take this opportunity to flush out issues and get to the root cause of issues. Ensure the individual feels safe sharing openly with you.

- ∇ What process(es) or procedure(s) is broken?
- ∇ How well do you understand the root cause of the issue?
- ∇ Was the solution of the problem directly within your control?
- ∇ Did you have the responsibility, accountability and autonomy to act?
- ∇ Did you plan well, but fail to execute?
- ∇ Did I fail you in any way?
- ∇ Did you have the tools you needed to succeed?

## Boss: It's Solution Time

1. Given the way ways turned out, what would you do differently next time?
2. When did you realize there as a problem?
3. What action did you take?
4. What is your plan to address this problem so it will not happen again?
5. What resources do you need?
6. How can I help?
7. Would you like my recommendation?
8. How will you know the issue is corrected?

Issues Sorting

Issues That Can't Be Solved
Issues the Boss Will Solve
Issues the Employee Will Solve

The contents of this form are taken from Gino Wickman's & Rene Boer's book, *How to be a Great Boss*. Team Foster Strategy LLC highly recommends reading this book.

