

Conducting a Counseling Session

Begin the Session:

- Set and maintain a constructive tone; be calm, professional, and focused.
- Seek cooperation, not confrontation, by focusing on how the employee's conduct or performance fits into the total organization.
- Ask "is this a conduct or performance issue"? Consult with your ER Specialist if unsure.
 - Is your employee a technically competent employee who just can't get to work on time? Do they lack training or skills to do the job?
 - Acknowledge the good performance/conduct, but address failure to follow agency's policy(s).

Stick to the Facts:

- Be prepared by having a concrete example ready, the best way to counteract denial is with hard data.
- Keep your objectives in mind; don't get pulled off target by excuses. The more you get involved in making suggestions and dealing with excuses, the further you are from the objective of your meeting.

Ask Questions:

- Choose several points throughout your comments where you can stop and get confirmation that he or she understands the problems and your expectations.
- Provide opportunities for the employee to respond, this will keep the employee active in the discussion and may lessen the negative connotation of a "lecture."

Listen Actively:

- Most people are better at talking than listening. If you are in a meeting in which you expect an employee to be participative, you should resist the urge to be directive.
- Active listening is an interpersonal skill above and beyond your technical knowledge and skills and demonstrates to the other person that you hear and understand their point of view.
- Paraphrase by restating in your own words what the other person has said. This will ensure you heard them correctly and that you understand.
- Avoid interruptions and distractions.
- Use silence to encourage the employee to take responsibility for the problem and solution.

Avoid Arguments:

- A counseling session should never escalate into an argument.
- Keep the meeting on track; keep coming back to the main issue.
- Modulate your voice; be mindful of your body language.

Take Notes:

- Keep notes of the meeting. Often time there are no requirement to document a session, but you may benefit by documenting the main points.
- Immediately after any such discussion with an employee, you should take a few minutes and make a dated note for the file to document the matters discussed and any assistance offered.
- Document the main points of the meeting in case the behavior needs to be addressed again; your notes will provide you with a reference of an agreed upon plan of action.
- If such a note would help confirm your mutual understanding of the matters discussed, you should share it with the employee.
- Contact Employee Relations for information concerning the records maintenance of supervisory notes.

End the Session:

- At the conclusion of the meeting, end on a positive note by emphasizing that improving employee's performance is a mutually beneficial goal.
- Summarize the results of the meeting and action plan by:
 - Making sure the employee understands the action plan and that you both agree on and what resources will be provided (time, training, etc).
 - Go over what is expected of you (supervisor/manager) and what the employee is expected to accomplish.
 - Establish a process to follow up on your employee's progress.
- Provide employee with a written summary within a reasonable amount of time after the meeting, a written summary is particularly valuable if you will be trying something new or changing any work assignment routine.