

Location:

- Whenever possible, conduct the meeting in a private place where the conversation is not able to be overheard by others.
- If you work in a cubicle, you must find a way to work around it. For example, use a conference room or a private corner somewhere.
- The location must be somewhere where both of you can be free to express yourselves freely in order to achieve your objectives.

Seating arrangement:

- Consider the physical placement of tables or desks and chairs.
- Strive to make sure both parties are comfortable in a private setting, ideally where both of you can take notes on a desk or a table.
- A business setting is preferable to a public setting such as a coffee shop or walking around the block.

Time:

- Schedule a time with employees well in advance.
- Consider the appropriate time of day; choose a time based on your knowledge of the employee. Ask yourself:
 - Is he or she a morning person?
 - Is this going to ruin his or her day? Is he or she going to want to leave?
 - Is this someone who needs to have counseling on Friday so he or she can sort things out over the weekend?
 - Or, is this a person who will feel like you are leaving no opportunity for response for 2 days?
- Set aside adequate time, a counseling session usually last one hour.
- When scheduling a meeting to discuss a performance issue, make sure you allow adequate time for your comments and any feedback from the employee. If more time is needed, consider scheduling a second session.
- Check and make sure there are no important events scheduled at the same time that may be distracting.
- Turn off mobile devices and use a space where you won't be disturbed by phones ringing; or have your phone calls redirected.
- Face-to-face counseling is best. If you have employees who telework, schedule counseling sessions when they are in the office but keep timeliness in mind; excessive delay can dilute the process.

Representative in attendance:

- Generally, no representative needs to be present during counsel, but if in doubt, consult your ER Specialist.