

Managing Difficult Conversations

PLAYBOOK

Introduction

As HR professionals, the ability to address performance concerns, mediate conflicts, and deliver constructive feedback is essential.

In your role, **navigating difficult conversations** is key to creating a healthy workplace culture and guiding line managers through these nuanced interactions.

You might also hold the “unpopular opinion” at times, championing not only the best interests of the business but also advocating for those who might feel underrepresented within the organization.

This resource will provide you with actionable steps and hopefully foster the confidence you need to navigate difficult conversations in the workplace smoothly.

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3 // **Following up**

Examine the follow-up process as an essential step, ensuring clarity, accountability, and ongoing support after a difficult conversation.

Laying the Groundwork // Step 1

UNDERSTANDING THE ISSUE

Defining the issue is a pivotal step in navigating difficult conversations. It lays the foundation for focused and purposeful dialogue and guides the interaction toward a constructive resolution. On the next page, there are four categories of HR problems encompassing a variety of workplace challenges, including performance-related issues, conduct concerns,

organizational changes, and interpersonal conflicts. Each of these requires tailored approaches for effective resolutions. You might be tasked with leading the conversation in some instances; for others, it might mean supporting managers in addressing an issue.



Performance concerns

- Failing to meet deadlines
- Poor quality of work
- Poor customer service
- Poor organizational skills
- Work with inaccuracies and errors
- Insufficient knowledge and skills in job-related tasks



Conduct concerns

- Violating company policies and codes of conduct
- Unethical behavior or misconduct
- Consistent absenteeism or tardiness
- Perpetuating harassment or discrimination
- Failure to adhere to workplace safety guidelines
- Breach of confidentiality or privacy policies



Organizational changes

- Restructuring, mergers, or acquisitions
- Downsizing or layoffs
- Leadership transitions
- Facility relocations



Interpersonal conflicts

- Disruptive communication within teams
- Lack of effective collaboration
- Personal disputes affecting team dynamics
- Lack of conflict resolution skills
- Inability to work well with diverse groups

Understanding the problem goes beyond just describing it. It involves exploring why it demands attention and resolution. Is it unethical or unlawful? Is it a conflict of personal values? Is the issue you're exploring of a sensitive nature? In challenging HR scenarios, narrowing down the problem helps strip away ambiguity and ensures that everyone involved is on the same page. It allows you to pinpoint the root cause, identify specific areas for improvement, and collaboratively explore potential solutions.

By taking the time to articulate and agree upon the problem, individuals can collectively work towards meaningful outcomes, fostering a culture of transparency, mutual understanding, and proactive problem-solving in the workplace.



Laying the Groundwork // Step 2

IDENTIFYING A DESIRED OUTCOME

The type of problems you are addressing will largely dictate your conversation's desired outcome. For example, when faced with an issue of performance, the goal of the conversation is often to support and help improve it.

With behavioral issues, you'll need the conversation to trigger a change in the way that they are interacting with their colleagues or clients. The template on the next page contains questions to help you prepare for your difficult conversation.

QUESTION	EXAMPLE
What is the issue?	Tom's role has been affected by a restructure, and his employment will be terminated.
What is your desired outcome?	You want to inform Tom of the restructure, discuss the next steps, and address his concerns and questions.
How will you know this conversation was successful?	Tom is aware of the reasons behind the restructure, what will happen next, and the support he needs.
What might stop this conversation from being successful?	Tom might be upset or angry at the news and project this onto you.
What experience do you want to create for your conversation partner?	You want to create a safe space to address concerns and ensure the process is clear.
What do you need to keep in mind about your conversation partner to make it an effective conversation?	This is a sensitive conversation, and Tom might not be ready for the news.
How do you need to act during the conversation?	Be assertive about the situation but open and empathetic.

Fill in the appropriate information below.

QUESTION	YOUR CONTEXT
What is the issue?	
What is your desired outcome?	
How will you know this conversation was successful?	
What might stop this conversation from being successful?	
What experience do you want to create for your conversation partner?	
What do you need to keep in mind about your conversation partner to make it an effective conversation?	
How do you need to act during the conversation?	

Laying the Groundwork // Step 3

COLLECTING INFORMATION

Once the problem is identified and a goal is set, collecting relevant information becomes imperative. This involves gathering data, perspectives, and any relevant context to understand the issue at hand thoroughly. This better equips you to navigate the conversation. The information you collect should bring you closer to a complete understanding of the issue without creating preconceived ideas.

In terms of what information might be relevant, you can consider:



Quantitative data

Performance metrics, project timelines, client satisfaction scores, missed deadlines



Qualitative data

Individual perspectives and experiences, employee surveys and feedback, records of previous communication



Document review

Consulting documentation related to the problem, examining policies and procedures, and reviewing historical records

Laying the Groundwork // Step 4

DETERMINING YOUR ROLE

In laying the groundwork for difficult conversations, determining your role is an important step that significantly influences the dynamics of the upcoming dialogue. Knowing your role in a conversation greatly influences your priorities, the degree of impartiality you should uphold, your decision-making authority, and the envisioned outcome of reaching a resolution.



Mediator

Acting as a mediator, your focus is on creating a safe and neutral space for communication. Your role involves guiding the conversation, ensuring that all parties feel heard, and facilitating a constructive dialogue. Maintaining impartiality is crucial to fostering open communication and resolution.



Facilitator

As a facilitator, your role is to guide the conversation toward a solution. You actively participate in the discussion, offering insights and asking probing questions. The facilitator aims to keep the conversation on track, ensuring it progresses toward the predefined goal while encouraging collaboration.



Active participant

Choosing to be an active participant means fully engaging in the conversation and having an interest in the outcome. This involves sharing your perspective and collaborating on potential solutions. This role requires balancing assertiveness and receptiveness to foster a cooperative atmosphere.



Decision-maker

In certain scenarios, your role may be that of a decision-maker. As the individual responsible for making final decisions or implementing solutions, your focus is objectively evaluating the information presented. This role requires a prudent and fair approach to reach resolutions that align with organizational goals.

Applying Communication Principles

Once you've laid the groundwork, it's time to engage in the difficult conversation. While each conversation will involve different personalities, dynamics, and issues, certain principles can help you navigate the conversation smoothly and empathetically.

Crucial Conversations (authored by Joseph Grenny, Kerry Patterson, Al Switzler, Ron McMillan, and Emily Gregory) introduces a framework of seven core principles that lead to greater success when managing difficult conversations. Equipped with these guiding principles, you can approach your upcoming challenging dialogue with an enhanced sense of assurance and confidence. They can direct you through the intricacies of the conversation. Resist the urge to give in to the pitfalls of your own emotions and retaliate, as doing so would destroy the possibility of a constructive dialogue.

1 Start with heart

Begin with a clear understanding of your motives and desired outcomes, ensuring alignment with organizational values.

EXAMPLE

When addressing a performance issue, you can start with heart by framing the conversation around the development and growth of the employee. You might express a genuine interest in helping the individual succeed, highlighting the organization's commitment to employee advancement. This approach sets a positive tone, encouraging collaboration to address challenges and create a culture of continuous improvement.

2 Learn to look

Be attentive to signs of potential breakdowns in communication and address issues before they escalate.

EXAMPLE

You can learn to look for nonverbal cues during a meeting about a sensitive issue. By recognizing signs of discomfort, such as body language or hesitancy in speaking, you can intervene by acknowledging the tension and creating a safe space. By addressing these cues promptly, you can ensure that concerns are brought to light and can be addressed constructively before escalating into more significant challenges.

3 Make it safe

Establish a psychologically safe environment where open and honest communication can flourish.

EXAMPLE

During a team meeting addressing organizational changes, you can make it safe by explicitly stating that diverse opinions and concerns are welcome. You can emphasize that the discussion is an opportunity for constructive input, ensuring employees can express themselves without fear of judgment or negative repercussions.

4 Master your stories

Challenge personal narratives and assumptions to approach conversations openly and unbiasedly.

EXAMPLE

In a scenario where an employee's performance has declined, you can master your stories by reframing assumptions. Instead of assuming a lack of dedication, you can consider potential external factors such as personal challenges or workload issues. This mindset shift enables HR to approach the conversation with more empathy and understanding.

5 State your path

Clearly communicate thoughts and feelings using "I" statements to avoid defensiveness.

EXAMPLE

In addressing a performance concern, you state your path by expressing observations and impact. Instead of saying, "You are not meeting expectations," you might say, "I have observed a pattern of missed deadlines, and it's affecting the team's overall productivity. I would like to understand your perspective on these challenges and discuss potential solutions together." This approach fosters a collaborative conversation focused on improvement rather than placing blame.

6 Explore others' paths

Actively listen and seek to understand the perspectives and emotions of others.

EXAMPLE

In a conflict-resolution conversation between two team members, you can explore others' paths by facilitating a dialogue where each party can express their concerns. By actively listening to both perspectives, you can gain insights into the root causes of the conflict and can guide the conversation toward finding common ground and mutually acceptable solutions. This fosters understanding and promotes a collaborative resolution.

7 Move to action

Translate dialogue into concrete results by creating actionable plans and fostering commitment.

EXAMPLE

Following a discussion with a manager about feedback from their team, you can move to action by implementing a comprehensive training program to address identified gaps. You can establish clear timelines, provide resources for skill development, and regularly check in with them to monitor progress. This proactive approach addresses concerns and demonstrates a commitment to continuous improvement and employee development within the organization.

Following Up

You might think that once you've faced the challenging conversation, all the work is done, and you don't have to worry about it anymore; however, that would be a mistake. The follow-up process is critical to solidify positive outcomes and ensure ongoing support. It can bring closure to an emotional discussion or clarity to a confusing one.

Beyond that, it serves as a mirror, allowing you to articulate and summarize your perspective on the unfolding dialogue. Simultaneously, it becomes a pact, a shared commitment that ensures accountability for the next steps, fostering a collaborative journey for you and your conversation partner.

Whenever deciding on a follow-up plan, there are a few key decisions you'll need to make once the conversation has finished. You can use the template on the next page to guide you through them.

QUESTION	EXAMPLE
What were the outcomes of the conversation?	Tom understood the reasons for the restructure and what this means for his role, although he was upset.
What are the next steps?	Tom will reflect on his next steps and have a follow-up discussion.
What is the intention of your follow-up?	The intention is to determine action points and provide support.
When would be the right moment for it?	The right time would be in a week, once he has had a chance to process it.

Fill in the appropriate information below.

QUESTION	YOUR CONTEXT
What were the outcomes of the conversation?	
What are the next steps?	
What is the intention of your follow-up?	
When would be the right moment for it?	