

**| LEADER OF
EXPERTS**

PERFORMANCE CONVERSATION GUIDE

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Purpose of the Guide

This conversation guide is designed to support leaders of experts in structuring development conversations with their team members.

The guide includes advice to help you prepare for typical conversations with experts who present different challenges. These conversations may be with a:

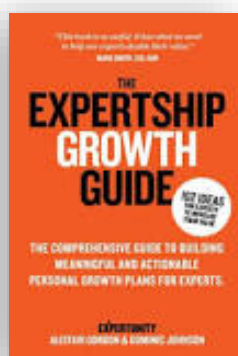
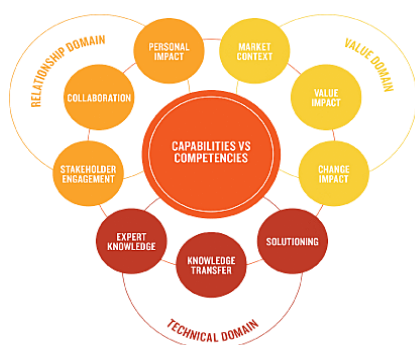
- **Stretch performer** – an expert exceeding expectations and is therefore likely to be eager to know what’s next for them in their career. Rather than a promotion this may be exposure to large projects, a wider geography in which to operate, or additional responsibilities.
- **Steady performer** – an expert who consistently meeting expectations, and therefore has an opportunity to go from “good to great”. They’ll want to know, being brilliantly technical already, how they can grow their impact and influence.
- **Deluded underperformer** – someone who thinks they are performing at a higher level than they actually are. For many experts, this means being technical very capable, but having mastered few enterprise skills.
- **Underperformer** – someone not meeting expectations across several capabilities. Even the technically proficient can be under-performing if they have broken stakeholder relationships.
- **Severe underperformer** – someone consistently underachieving across core capabilities, despite feedback received. Average technical skills and no enterprise skills means the expert is in the wrong role.

The guide is intended to be used in conjunction with *The Expertship Model* – a document which describes 9 capabilities to be a ‘Master Expert’. In addition, this guide is to be used in conjunction with *The Expertship Growth Guide*, which offers specific development activity suggestions on how to improve performance in each capability.

The Expertship Model

The Expertship Growth Guide

The Expertship Conversation Guide



Guiding Principles

Manager support is critical for the professional growth of technical experts. Often experts have been recognised for their deep domain knowledge and technical skills, which have been nurtured over time. This focus on technical skills development may mean skills such as stakeholder engagement and commercial acumen have been under-invested in (enterprise skills).

To make a greater impact, you can help your team of experts to develop wider connections and enhanced credibility so they can link their expertise to organisational value.

Some important things to remember when conducting professional growth conversations with technical experts:

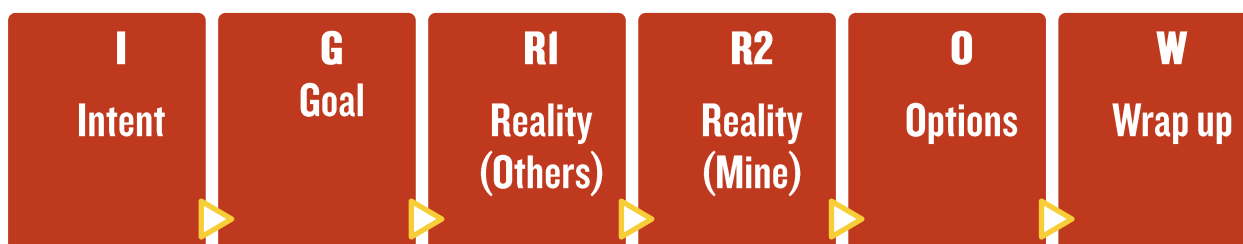
- **Regular and honest communication is key** – providing timely, balanced (both positive and constructive) feedback about an expert's performance (including a balance between technical delivery and enterprise skills) will support both individual growth and organisational performance. Waiting for 'the right moment' runs the risk of the feedback being too late to have the desired impact, or an inaccurate memory of the event.
- **Establish rapport and trust from the onset** – mentally prepare for the conversation, be mindful of the environment where the conversation is going to be held (go somewhere private, quiet and comfortable), and demonstrate care and respect. When it comes to the personal growth of technical experts, they may know more than you technically, but you'll know more about enterprise skills. Clarity about this situation upfront is helpful and confidence building.
- **Development conversations are a collaborative, two-way process** – your role is to ask questions to prompt self-reflection and ownership around future aspirations and enable individuals to identify practical ways forward. Crucially, leaders of experts don't have to know all of the answers and are not expected to – the expert will know what they need to do technical if they are asked about it effectively.
- **Career and development conversations are future focused, while performance reviews are backwards looking** – when using The Expertship Model, it's important to discuss current performance level and what they can do to reach the next level. Many experts believe they are the finished article, but that's only in the technical arena (and that's not always true either). In the enterprise skills domains, there is usually plenty of improvement possible.
- **Act as a coach, not a teacher** – this helps to foster independence rather than dependence as individuals take responsibility for their own success. This is particularly important when it comes to leading very smart experts.
- **Use the SBI (Situation, Behaviour, Impact) model** – this simple model helps to structure feedback to focus on facts.

Structuring Conversations: IGRROW

IGRROW is an Expertunity adapted version of the classic GROW model. IGRROW can be used to offer advice, gather briefs, create solutions, make decisions, and plan challenging but important conversations. It is ideal for development and career conversations.

We promote the concept of coaching during these conversations as it enables the team member to consider perspectives and suggest alternatives that they may not have previously considered. In a coaching conversation, it is not your responsibility to arrive to a solution. Instead, it is your responsibility to facilitate self and other awareness and outside the box thinking so that the team member can generate and own the solutions.

We strongly recommend that you plan to approach each of these conversations using the IGRROW structure.



- **Intent** – What is my intent with this conversation/plan? Intent describes your motivation for getting involved. How will I communicate this intent to those I am about to interact with?
- **Goal** – What is the objective we are trying to achieve with this conversation/plan?
- **Reality (Others)** – What are the current facts/situation/challenges from their perspective? What do they know and see? (How do you think you are performing?)
- **Reality (Mine)** – What are the current facts/situation/challenges from my perspective? What do I know and see? (How do I see you are performing, or how other people might see you performing?)
- **Options** – What options do we have to solve the problem and achieve the goal? An extensive list of brainstormed options is best, because the next step could be a combination of options. Options should be considered via their “pros” and “cons”.
- **Wrap Up** – What is it that we have decided to do, why, and by when, and how will we monitor whether the option chosen was correct?

The Development Process: Some Powerful Sample Questions

Development can only occur through the individual themselves. You, as their manager, cannot dictate an expert's ability to develop themselves if they see no value in it. However, as their manager, you have the responsibility to support the individual throughout their journey, guide them through the creation of a SMART development plan (specific, measurable, actionable, realistic/relevant and time-bound), and inspire them to action.

When looking to support team members with the creation of a Personal Growth Plan (PGP), we recommend scheduling in an initial 60-minute conversation with each individual.

- **Clarify purpose of the conversation:**
 - The purpose of the conversation is to support your learning, growth, and achievement of professional goals.
 - Your development will depend on your willingness to be open, vulnerable, honest and to stretch yourself outside of your comfort zone.
 - These conversations aim to help to accelerate and make growth purposeful.
- **What does development mean to you? Uncover aspirations and interests:**
 - What are your career aspirations?
 - What activities motivate and energise you?
 - What skills do you enjoy using?
 - What do you enjoy doing less? Why?
 - What knowledge areas are you drawn to?
 - What makes you feel valued in the workplace?
 - Ideally, what will your career success look like in 5 years' time?
- **Unpack current strengths and improvement opportunities:**
 - On a scale of 1-10, how close are you towards achieving your described career goal in 5 years' time?
 - What do you think your strengths are and how do these align with your current work? What are you currently doing well?
 - What holds you back from achieving your goals?
 - Is there anything preventing you from taking your performance even higher?
 - What do you think you're not doing as well in? What's the impact of that?
 - What would you like to improve on?
 - I'd like to share some examples of behaviour I've seen that really contributes to some of your success, as well as where I think you could improve. What I want to share isn't in any way judging you as a human being but looking objectively at performance. Can I just check-in – are you interested in me sharing some information to help improve your performance?
 - So, with the objective of improving your performance and growing your impact and influence, I'd like to share different forms of data. It's easy to take this personally, but that isn't the objective here. It's to help you achieve your full potential. Are you ok to have a conversation regarding how you can reach even higher levels of performance and impact?
- **Explore options for achieving their focus and necessary support:**
 - What do you think you need to master to become even more effective and reach your goals?
 - How can you build on your strengths?
 - How can I help you to achieve your career goal?
 - What type of support do you need or want from me?
 - What steps can you take to move from Specialist to Expert (or Expert to Master Expert)? (Expertship Model)
 - What support do you need to minimise some of the Derailing behaviours discussed? (Expertship Model)
 - What are you currently doing to improve?
 - How often do you want to meet to discuss your development (no longer than monthly is ideal)?

Note: Silence is golden in coaching. Allow the expert some time to think and come up with the answers that are not immediately conscious or front of mind. Remember the 80/20 rule in coaching – with the coachee talking 80% of the time and the coach 20%. Only offer suggestions after asking for permission from the expert.

- **Confirm next steps and demonstrate confidence in their ability to implement actions**
 - So, recap for me what will you do between now and when we next meet...? Why?
 - What does success look like?

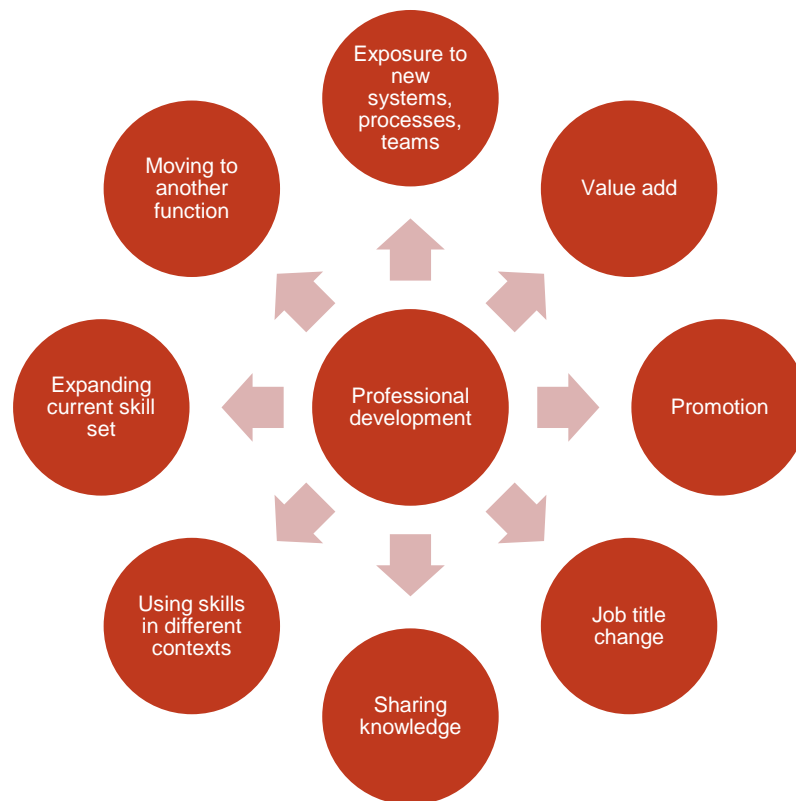
Remember: Professional development doesn't necessarily take a vertical approach up the career ladder to increased responsibility, but can involve:

- Growing in current role through increased exposure to new systems, processes and teams.
- Leveraging current skills into a new area at the same level.

- Expanding current skills to take them to the next level, or developing new knowledge and skills.
- Moving laterally across a function.
- Sharing knowledge to others.

Career aspirations is about adding value to the expert and how they can further their contributions to the organisation. It is related to job satisfaction, career advancement, and furthering opportunities to new experiences. By doing so, the expert can effectively add more value and have a broader scope of future career options.

It is not just a job title or just getting promoted.



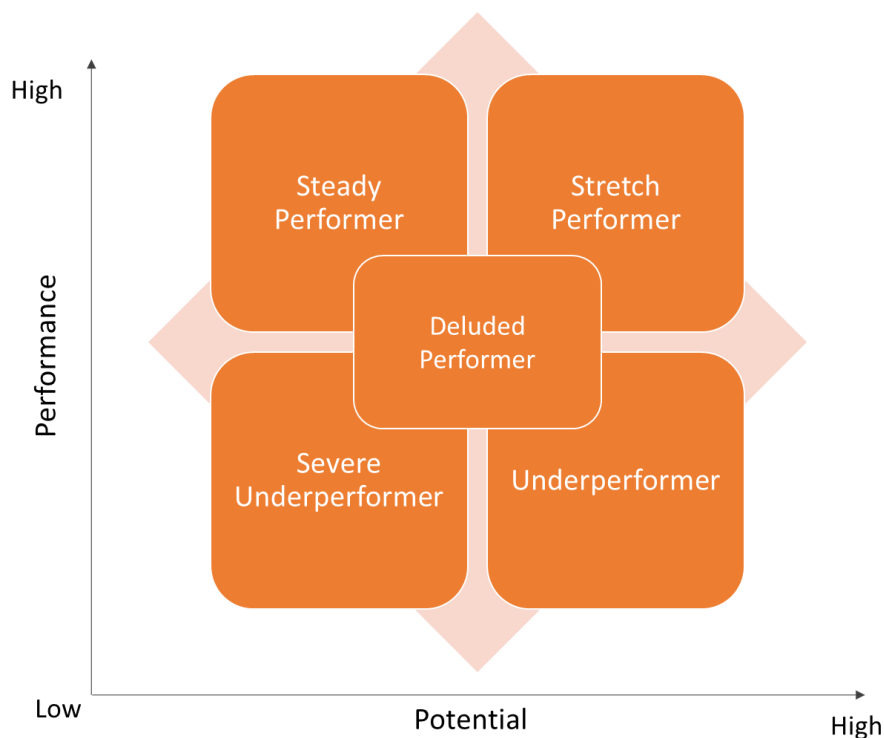
Typical Types of Performance Conversations

Below outlines some typical types of performance conversations you are likely to encounter.

Each conversation needs to have a defined purpose and outcome so that both yourself and your team member are clear on next steps. Plan what you are going to say before entering the meeting. We would recommend that these meetings take place on a regular basis and in a private environment.

Steps below:

1. **Be prepared:** Let the expert know beforehand that you would like to discuss how they are operating in line with the The Expertship Model.
2. **Share the model:** Give a copy of the model to the expert and ask them to circle which level they see themselves performing at for each of the capabilities.
3. **Consider (and justify) your own assessment:** Assess which level you think the expert is operating at. Consider specific examples of behaviours observed, and the impact it had. Consider what behaviour you'd like to see that would show you the team member is operating at a more "expert" level.
4. **Share your assessment:** Be prepared to share your response in this meeting, and explore reasons why the expert has rated themselves in a particular way.
5. **Set clear expectations:** Agree on specific goals you and the expert want to achieve through the conversation.
6. **Set up regular meetings:** Agree on a regular meeting to discuss their performance progress.



Conversation 1 - Stretch Performer

Issue: The expert is identified as high potential talent. Engaging and growing them is critical to retaining this talent.

Tactic: Provide new or wider responsibilities that will assist them to showcase their ability and continue to grow towards Master Expert level. These new responsibilities should also prepare them for any future/desired role. Discuss what a competent and then an outstanding performance looks like. What is the difference? Coach them so that they are competent and ready to complete increasingly difficult tasks. Provide feedback and support as required.

What to prepare:

- Examples of tasks and behaviours that the expert could take on or will need to be able to complete in the next role. Perhaps use examples of skills that guru-experts in the organisation demonstrate.
- Expected time frame of when the individual may be able to reach the next level. Agree what the payoffs might be (perhaps remuneration, but kudos, reputation, and greater influence and impact are usually highly motivational for experts)..
- If new opportunities are unlikely in the near future, consider what you can do to keep them engaged until they are ready. This may include developing and delegating to junior talent and freeing up their time so they can shadow others or work on whole-of-enterprise projects.
- Opportunities to connect the individual to a mentor or coach.
- Make sure feedback is balanced between technical excellence and the great relationships the expert has developed.

Remember: To give appropriate attention to the star performers. Too often, time and energy can be directed towards the ones pulling the team down. Showing appreciation to your high performers, and ensuring you keep them engaged, is critical to developing a high performing culture.

Conversation 2 - Steady Performer

Issue: The expert is a steady performer. However, their development has become stagnant – their performance is average and has the ability to improve. They do not go above and beyond.

Tactic: Find out what the expert is motivated by and what their career aspirations are. Agree on stretch learning goals to further gain experience and work towards. Many experts fall into this category, which they describe as “being stuck”. They are frustrated by repetitive work, and often being the only source of technical expertise in their specialised field. A discussion about how they can break out of this situation is important.

What to Prepare:

- Examples of areas where the expert is performing well and areas where they have ability to further develop.
- Examples of support that you can provide.
- Suggestions of where you would like to see them develop (based on strategic priorities, observed strengths or where the individual is more challenged). In the case of experts, this may be developing greater enterprise skills to complement their technical skills (use the Expertship Model to demonstrate this).
- Suggestions of new responsibilities/projects where the expert could take on a larger role or develop new skill sets.
- What do you think the expert is motivated by? How can you offer them an incentive to stretch?

Conversation 3 - Deluded Performer

Issue: The individual has little insight into their actual versus perceived performance. They believe they are performing better than they are. Note that this may take two meetings, not one. In the first they will be shocked by the news they are perceived as an under-performer, and may need time to digest this.

Tactic: Be open and honest when presenting feedback. Offer different perspectives and provide behavioural evidence as to why their view may differ from reality. You may want to provide examples of other team members doing a far better job. Or examples of problems that occur because of the low or slow quality of their work.

What to prepare:

- An example of an Expertship 360 survey, and information about the process of running one.
- The team member may be defensive when you approach them. Have specific examples of feedback from different perspectives to share. Consider using the SBI feedback model.
- Offer to provide feedback to the expert more frequently.
- Frame the conversation so that it is factual and not a personal attack. Explain your intention in having the conversation and sharing this feedback. Your intent is also to help them be very successful in role, as quickly as possible..

Conversation 4 - Underperformer

Issue: The individual is currently underperforming against organisational expectations for that role.

Tactic: Provide support to help them perform at an acceptable level. You should be looking to set out some clear performance objectives and a time by which they need to be addressed. Ask the individual for more information about why their performance has been lacking and what support you can offer them.

What to Prepare:

- Capture examples of underperformance using the SBI feedback model.
- Consider what support you can provide to help lift performance (e.g., additional training in key areas, coaching with yourself or another coach, additional check in meetings to help keep the individual accountable to their agreed goals).
- A copy of the organisation's performance management policy.

Conversation 5 - Severe Underperformer

Issue: The individual may be exhibiting a lot of “de-railing” behaviours, and/or operating at the “specialist” level when their role requires them to be a lot more strategic, collaborative and decisive. Remember – significant underperformers can be turned round if they haven't properly appreciated the importance of enterprise skills and being a team player. However, spending too long with SUPs and not enough time with high performers is a typical mistake many leaders make.

Tactic: Check that your team member's attitude and skills are a fit for the organisation and the role they are in. Be prepared to have an adult conversation with them. Have a 'no surprises' policy –let them know beforehand that you need to have a serious conversation with them. Use the probation period effectively and have regular, and documented, performance check ins.

Note: *This conversation should only be had when you've had repeated conversations about declining/poor performance before.*

What to Prepare:

- Be aware of unfair dismissal laws, which includes terminating an employee for poor performance without warning of poor performance.
- Speak to HR about how to terminate someone for poor performance. A member of HR may need to attend your conversation with the individual.
- Have specific behavioural examples of when the individual has fallen far below expectations.

When starting the conversation, lay out the performance expectations and standards in the Expertship Model or relevant organisation capability framework. Explain that, with the individual's experience and knowledge, they are expected to be able to perform at this level. Ask them to assess their own performance or share examples that illustrate how the employee is not operating at this level.

You then have three options:

- You could tell them they can choose to leave now or in the near future after thinking about it overnight.
- You can coach them to understanding that it's in their best interest to look for a job that's a better fit for the skills and interests – either internally or externally – over the next 4 weeks.
- You can tell them you'll need to begin the disciplinary process immediately unless they decide to leave or look for more suitable employment.

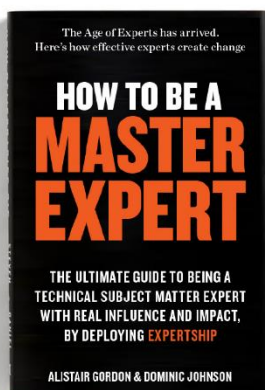
For more information, see: <https://www.fairwork.gov.au/employee-entitlements/managing-performance-and-warnings>.

Remember: The focus of the conversation should be on behaviour and performance – not the person. Remain objective by focusing on data, facts, and outputs rather than opinion. Remind the team member that the point of the conversation is not to judge them but help them to be satisfied in their career, fulfil responsibilities in their role, and achieve their potential.

Additional Resources Available



The *Expertship Growth Guide* is available for purchase and contains over 100 development actions an expert can take to build their influence and impact. Based on the Expertship Model. Available from most online vendors.



Master Expert is the complete manual on how to be a Master Expert. It has 5-stars on Amazon. Available from most online vendors.

DEVELOPMENT PROGRAMS

Expertunity operates globally and provides opportunities for high value technical experts to undertake MBA-style development to increase their influence and impact as a technical expert.

Mastering Expertship is the signature program globally for high value technical experts.

Leader of Experts is a one-day program for leaders of experts, designed to hone their skills in helping their experts to excel.

Details at: www.expertunity.global