

Leaders Toolkit

Structured Conversation Template

A guide to help you conduct effective performance conversations

Introduction

This conversation framework is adapted from Neil Rackham's SPIN model of selling, a proven approach that builds rapport and drives insight through purposeful questioning. ElliottHR has tailored the model for use in performance and coaching conversations, helping leaders engage employees in constructive dialogue.

This guide is designed to support managers in preparing for performance discussions and to serve as an in-the-moment reference when guiding conversations. It provides a structure for asking questions that are intentional, well-sequenced and solution-focused.

The SPIN framework organises the conversation around four key elements: connection, focus, solution and action.

Ultimately, the goal of any performance conversation is to engage the employee—to frame the issue as a shared challenge rather than a personal shortcoming. When this happens, defensiveness decreases, accountability increases and genuine problem-solving can begin.

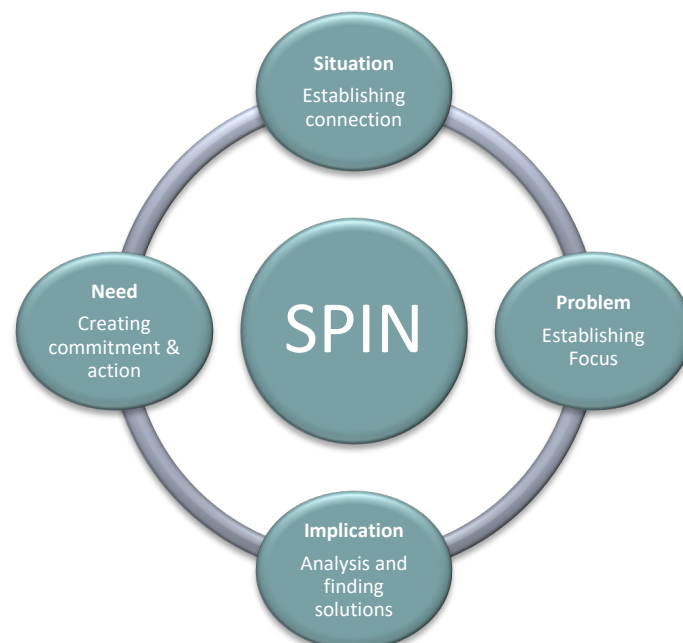
The model focuses on 4 key areas:

Situation

Problem

Implication

Need



Situation

These questions are designed to gather key facts, context, and background information. They give you an opportunity to fully understand the situation while also building rapport and connection. Focus on exploring the issue—not assigning blame. **Attack the problem not the person.**

Questions	Responses
<p>State the business terrain and context and explain why you are having the conversation.</p> <p>For example, “current strategic goals/demands, changes to competitors, a poor quarterly result, a customer/staff complaint, means I need to talk to you about some business/performance issues.”</p> <p>Invite the person into the conversation in order to align perceptions. Use open ended questions, both factual and sensory.</p> <p>For example:</p> <p>“What’s going on?”</p> <p>“How are you feeling?”</p> <p>“How are you feeling about your performance?”</p> <p>“What’s been keeping you up at night?”</p> <p>“What are you concerned about?”</p> <p>“What are you fearful of?”</p> <p>“Have I got the facts right?”</p>	

Problem

Once the situation has been explored, the next step is to clearly define and agree on the core problem. The goal is for the employee to view this as a **shared challenge**—one that you can work through together in the first instance.

Questions

Responses

Explain the problem as specifically as you can, for example, “you are not meeting job expectations, KPI’s, sales figures, I have some feedback about you saying [insert] and so on.”

Clearly state the problem, for example - given the situation, the problem is that you’re:

Not performing

Not meeting the job requirements

Letting the team down

Letting the customer down

Not helping me (manager) do my job

Affecting the success of the business.

Questions to ask of the employee:

“Do you agree? If not why not?”

“Do you have any particular problems or challenges that are contributing to this problem?”

Implication

This stage is more targeted. The aim is to help the employee step back from the detail, take ownership and begin generating their own solutions. The focus is on moving forward—shifting from being at the effect of the problem to being on top of it. Inspire action and behavioural change by highlighting the risks of maintaining the status quo. Break the problem down into actionable priorities to determine what needs to be addressed first.

Questions	Responses
"What would be the likely outcome if the status quo remained"	
"Why do you think this situation has occurred?"	
"Have you given any thought to how it might be resolved?"	
"Do you want this to get better?"	
"What would you say is the most important issue right now? Why?"	
"Have you considered... [this course of action, this result, this priority, etc]?"	
"Would it help if you delegated this situation to [fill in the blank]?"	

Need

These questions help you assert your key expectations as a manager, along with the needs of the business. This stage is about resetting the working relationship and clearly outlining job expectations. Focus on creating a win-win outcome by partnering on solutions—and ensure that all agreed actions are specific and time-bound.

Questions	Responses
<p>So given this problem, my need now is (for example):</p> <p>For you to meet your sales targets, for you to undergo some further training, for you to improve your attendance at work, and so on.</p> <p>But I also want to ask:</p> <p>“How can I help you to fix this?”</p> <p>“How can I help you to make this better?”</p> <p>Action Plan: (make notes here and then record in writing using Action Plan on next page and distribute to the employee after the meeting. Have them sign the document to validate the agreements)</p> <p>“What I expect is [insert] by when [date]”</p> <p>Follow Up: I will meet with you on [date] to check in and review the actions set.</p>	

Action Plan

Formalise the agreements above by completing the following action plan.

Action	Who's Responsible	Review Date	Status/Progress	Due Date	Date Completed

Additional Actions/Notes:

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Employee Signature

Date

Employer Signature

Date

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