

## Sample Counseling Session Outline

Typical steps to the counseling process are:

1. **Prepare for the discussion: Know what you're going to say, have facts available.**
2. **State the issue/s (this may be long or short, depending on the situation and examples available).**

Clear-cut—little chance for argument:

“As I mentioned when setting up this meeting, I’d like to talk with you about \_\_\_\_\_. Based on my observations, it seems that..... Some specific examples of when I observed this is when.... “

Vague or when supervisor is not direct observer:

“I wanted to talk with you today because I have been receiving reports/feedback that..... “I didn’t want to take any action on this matter before hearing your perspective. “

3. **Get the employee's side. There are two sides to every story, so really listen.**

“After hearing this, do you have any ideas where these perceptions may be coming from?”

4. **Clarify problem/get agreement a problem exists. Make sure the employee understands the problem. If it is a problem and not a misunderstanding, through discussion get the employee to agree that a problem exists.**

“Let’s make sure we both have the same understanding of the situation. It seems what happened is this..... Is that how you understand it?”

5. **Causes of problem:** The cause should be addressed, but the main focus should be on behavior.

“We both agree that this is an issue because (state the effect). So it seems that \_\_\_\_\_ (behavior) has to change if we want operations to improve.”

6. **Mutually discuss alternative solutions and mutually agree on action to be taken to solve the problem. Try to use the employee's solution where possible, agree on the action the employee will take and your role, set follow-up meetings.**

“What do you see as the next steps that need to happen to make sure the situation is improved?” **(may use)-** “You seem hesitant about this. Do you have other questions or concerns that we should talk about?”

7. **Conclude the counseling session. Communicate your belief in the employee's ability to make the needed changes.**

“I know this conversation has been about the changes that need to be made, but I just want to make sure you know I am very pleased with/that.....” “I really believe you can make these changes and they will definitely improve the current situation.... Let’s agree on a time to check in with each other to see how the plan is going.”

8. **Follow up and recognize improvement: Hold the follow-up meeting, recognize any improvement, follow the above steps if improvement hasn't occurred. Prepare to move into the disciplinary process if two attempts at counseling have failed.**

*Adapted from Society for Human Resource Management White Paper "Coaching and Counseling" by Mary Shurtleff and Steve McKenzie, SPHR (2002)*