

HOW TO HAVE MORE MEANINGFUL

QUARTERLY CONVERSATIONS



Conversations and interpersonal relationships are pivotal to maintaining our cultural differentiator and competitive advantage. But are you getting the most out of them? Do your employees have what they need to say, “I’m safe, I belong, and I matter” – particularly in times of heightened stress?

Get started with these tips!

1

Schedule a recurring meeting to ensure regular conversations.



The first step to an impactful quarterly conversation is having the conversation. A recurring meeting on your calendar will ensure these valuable conversations don't get overlooked in our hectic day-to-day tasks.

TRY IT!

Go to your Outlook calendar now and set recurring Quarterly Conversations with your team members for the rest of the year.



Offer to have a non-video "walking meeting" if the employee would be more comfortable.

2

Prepare before the meeting.



As a manager, you need to be clear on expectations and drive alignment. The Quarterly Conversations are a chance for you and the employee to step back from the day-to-day tactical elements and focus on the bigger picture business goals, employee development opportunities, and strengthening your relationship.

TRY IT!

A few days before your quarterly conversation, take some quiet time to:

- **Define** what you want to achieve during the conversation.
- **Reflect** on the past quarter, review notes from the last conversation, and plan for the future.
- **Gather data** such as feedback from the people you work with most, examples of past behaviors and outcomes, Pulse results, and other data sources.



Schedule planning time in your calendar now for your next Quarter Conversation.

3

Define expectations and goals.

Zoom out from the regular check-ins (1:1's) and reflect on the big picture. Check that overarching goals are still relevant, and whether expectations are being met.

TRY IT!

Ask questions such as:

- “What are you most proud of?”
- “What feels frustrating or disappointing?”
- “How are you progressing toward achieving your annual goals?”



Employees should have 3-5 clearly defined, documented, high-level goals for the year that provide key vectors while priorities shift.



4

Solicit feedback and give recognition.



Talk about accomplishments and opportunities to improve.



PRO TIP

Listen actively, ask clarifying questions, (“Can you tell me more?”) and take notes (to refer back to during the next meeting.)

TRY IT!

Ask questions such as:

- “What are some things you plan to start, stop, or continue doing in the next quarter?”
- “As your manager, what am I doing or not doing that gets in the way of your productivity?”

5

Discuss development and growth.

Make sure you understand your people's career ambitions and that everyone has what they need to reach their potential.

TRY IT!

Ask questions such as:

- “What are you learning?”
- “What do you need to be learning/doing better?”
- “Where do you want to be in 2-3 years?”
- “What support do you need from me and others?”



Try not to give advice unless they ask for it. Also, let people finish their thoughts.



6

Check in on well-being.



Ask how people are doing—physically, mentally, emotionally.

TRY IT!

Ask questions such as:

- “How are you doing mentally? Physically? Emotionally? Socially?”
- “In what way do you think COVID permanently changed or will change our work?”
- “How can we make this more sustainable for you?”



Acknowledge emotional states with empathetic statements such as, “That must be frustrating,” or “That sounds very stressful.”

7

Commit to actions.

Make it a great Quarterly Conversation by following up on what was discussed.

TRY IT!

- **Commit** to the actions you will both take moving forward.
- **Document** next steps and actions for the next quarter.
- **Take action** to follow through on your commitments.



PRO TIP

Don't confuse the longer-range strategy action items from Quarterly Conversations with more immediate tactical action items of regular one-on-one meetings.

How was your meeting experience?



Good



Bad

WANT TO LEARN MORE ABOUT

QUARTERLY CONVERSATIONS?



More quarterly conversation resources for both managers and employees are available on the [MyHR Employee Resource Center](#)

- [Quarterly conversation playbook](#)
- [Detailed videos on quarterly conversations](#)