

## Recording Sheet for the Narrative Interview Technique for Performance Management and Appraisal

The Narrative Interview is a way to gain a better insight into the motivations, skills and passions of an employee. It provides a respectful, non-confrontational vehicle for both the Leader and the Employee to discuss the relevance of individual profiling results extracted from instruments (eg. LSI, DISC, ID, MBTI) and It allows the Leader to appropriately confront an employee about less than satisfactory performance. Very simply, it is a way to nurture Talent and build the Relationship Capital of an organisation. Using the Narrative Interview, an appraisal becomes less about satisfying HR requirements and more about developing resonance and synergy between leader and follower.

### Important Note to the Interviewer

Before beginning any performance management process with someone, it is vitally important to warm up to the exercise yourself. Keep in mind that longitudinal studies of organisations clearly indicate that *the way in which an appraisal is conducted* ultimately affects the ongoing effectiveness of an employee and ultimately the bottom line profits of that organisation. Even a negative appraisal will be well accepted when it is delivered by a leader who has and demonstrates a genuine interest in the employee and an authentic desire to nurture his/her talent. Be aware of your posture, facial expressions and the tone you use. Ask all questions as a “Naïve Enquirer.” Deliver suggested changes with an attitude of *wonder*- “I wonder what strategies we could put into place to help your team members meet deadlines? What would be your suggestion?” “I wonder if there is a different way you could approach the Financial Controller to get a more positive response? I’ve found coaching to be very helpful. Would you be open to that?”

### TEMPLATE A

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Interviewer: \_\_\_\_\_

1. We are going to take a different approach today. I want to take this opportunity to look at how we are working **to help us all have a clearer understanding of what we’re doing** and to get some insight as **to how we can all improve our work environment and our lives generally. I’d also like to get to know you better.** During this time I will be making some notes and I want you to feel free to take notes too. *(This is to contract the personal space around the interviewee which will reduce the level of anxiety).*

*If the reason the person is there is obvious to both the interviewer and the interviewee, the leader can be upfront about this. E.g. “Clearly, we both know that things are not flowing in the way we would both like them to be. This is an opportunity for us to pause and look for practical ways that could be of help to both of us. (It is important to deflect people’s attention away from themselves and onto the issue(s) at hand. This reduces the need to be defensive and promotes objectivity.)*

2. **I invite you to dream.** Project yourself into the future and imagine you are looking at yourself enjoying the satisfaction of having accomplished all your desired goals and outcomes for this position. Really be there, don’t hold back. Look around you in your mind’s eye and imagine yourself enjoying it all. You’ve hit the mark, crossed the finish line, all outcomes are achieved. You are working so well, you attract head hunters. In fact so many of your goals and objectives have been attained, you are ready to move on to another level of your career.

3. **Describe** what this is like in a few words. Remember you are already there enjoying it. Make it brief.

4. *(Place Template A **only** in front of the person)* Now I’d like you to show me what that is like. You are going to create the picture of success and achievement you described.

5. **Choose a figure to represent you** and place it in the shape marked **Future**. Face the figure in the direction of the arrow towards the area marked “All Outcomes Achieved”.

6. **Choose another figure to represent you** and place it in the **All Outcomes Achieved** section. **Bend and shape the figure to show how you’re feeling** as a *Successful Achiever* enjoying the fruits of your labour.

Record some of the response words. E.g. Energised, Inspired, Budgets met, cooperation.

7. **Who else** is there with you in this ideal work environment? Use other figures to represent any other relevant people in this ideal workplace. They may or may not be part of the work environment in real life. Place as many relevant figures as you need to in order to create your ideal picture.

8. **What else** is there? Use props to represent anything else that is relevant to this picture. E.g. contentment, obstacles overcome, bonuses etc. Don't hold back! .

9. Point to the figure representing you in this picture. How is this person **feeling** living in the ideal?

10. Point to the **figures who are directly cooperating with you to achieve your goals and outcomes in this picture of success**. If they haven't been represented yet, use other figures to depict your ideal co-workers/teams, managers and leaders. Remember they may or may not exist in real life, you are projecting yourself into the future. Record who they are in the area marked **Support and Resources**.

11. What other resources do you have at your disposal here (e.g. unlimited budget)? Represent those using figures and/or props in the **Support and Resources** space and then **write who and what they are** in the same space.

12. What are the **qualities, practices and values** of the leaders, managers and co-workers you have depicted in this ideal work environment? Record these in the area marked, **Support and Resources**.

13. Imagine this figure (*pointing to the figure representing the interviewee*) is greatly appreciated and often head-hunted because of the **gifts, talents, skills and competencies** s/he brings to the table. Represent those things with props and then write what they are somewhere near the figure representing you.

14. Point to the figure representing you in this picture. What **role** is this person playing? What is s/he doing? How is s/he doing it? Record the role on the template in the space provided.

15. What roles are the others in the picture playing? Choose one person on which to focus. What is s/he doing and how is s/he doing it in relation to you?

16. **Life Balance**: Continue to stay in that ideal future work environment. Are there people or factors, outside of your work life, who are contributing to and/or celebrating in your success? Use figures and props to depict the outside support you have that is helping you to maintain a healthy life balance. They may be friends, family, spirituality, health ...anything that is important to you. They may or may not currently exist in your present reality but represent those things you would ultimately like to have in the picture. Depict them in the space marked "Life balance"

17. If this were a movie, what would the **title** be? Record that in the space provided.

18. How much do you like this picture? From 1 to 10, "10" meaning "a lot" what number would you give it? (*If the number is less than 7, invite the person to modify the picture so that it reflects his/her full dream.*)

Does the picture match the verbal description?	
Feelings:	
People Support	
Other Resource	
Qualities, Practices, Values	
Gifts, talents, skills, competencies	
Role:	
Other's Role	
Life Balance	
Title	
1-10	<input type="checkbox"/>

**TEMPLATE B**

**Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Interviewer:** \_\_\_\_\_

**Warm Up**

18. *(Place the second template alongside the first on the left side).*

Now, as we all know, our work environment is not always exactly what we'd like it to be. So let's look at the current picture to get an objective view of the way things are at present. Move the figure representing you in the "Future" box to the "Present" box on Template B. Make sure the figure is still facing in the direction of the ideal picture you have created.

**Show me**

19. **Present Situation:** Choose another figure to represent you. Bend and shape the figure to show how you're feeling generally in your current position as \_\_\_\_\_. Place it in the area marked "Present Work Environment".

20. **Who else** is there with you? Use other figures to represent any other relevant people.

21. **What else** is there? Use props to represent anything else that is relevant to this picture. E.g Deadlines, communication etc.

22. Point to the figure representing you in this picture. How is this person **feeling** in this position? Record the feeling on the template.

23. What **role** is this person playing? What is s/he doing? How is s/he doing it? Record the role on the template.

24. When this person is playing that role, how are others perceiving him/her? This perception may or may not be correct but how might that figure be perceived?

25. What role is this figure playing *(point to a relevant figure in the scenario)* in response to the role you are playing?

26. If somebody walked into this workplace what would they see? What is happening here?

27. How would they describe the culture of this work environment? What values and practices are evident?

28. If this were a movie what would the title be?

**Gap Analysis**

29. Looking at the two pictures, would an observer see any major differences? If so what are they?

30. **Under-Utilised Talents:** Are there talents and skills you have that are not being utilised in your current position? Choose props and/or figures to represent those **in the circle** on Template B. How do you see them being of benefit to the organisation/team/project? Record them in the circle.

31. **Hurdles and Obstacles:** What potential obstacles/hurdles do you foresee getting in the way of this figure achieving his/her desired goals and objectives? They could be part of the work setting, even people, or just be realities and challenges you are dealing with from outside of work. Use figures or props to represent those hurdles (if any) and place them between the two scenarios.

Feelings:

Role:

Other's role:

Work Culture:

Title:

Differences

Under-utilised talents

Hurdles/Obstacles

32. **Further Support and Resources:** What would this figure appreciate in terms of further support, training or resources in order to continue to be more effective in his/her job, do it better and/or to overcome the hurdles and challenges that are potentially putting the achievement of the desired goals and outcomes at risk? Represent these using figures and props in the area marked "Further support and resources" and then record what they are.

33. Imagine this is a movie and you are the director. The title of the movie is "From \_\_\_\_\_ to \_\_\_\_\_."

**What small movement could be made** in the first scene to get things in motion so that the scenario is more like the last scene? Remember you're allowed only one small movement.

If the person moved the figure representing him/herself, go to \*

*(If the person moved a figure other than his/her own, ask the following question:)* How long have you been waiting for this to happen? Is this likely to occur in the near future?

What small movement, a first small step, could **this** figure do in order to reach desired goals and objectives?

\*What is the **meaning of this move in real life**?

34. **How difficult** is this first step for this figure? 1. Easy 2. Difficult. 3. Very Difficult?

35. *(Pointing to the ideal)* **Do you like this picture? Do you want this picture?**

35. **Where do you see me here?** Choose a figure to represent me if I'm not already there. What support do you need from me to assist you achieve what you have depicted?

36. With that kind of support, **how long do you estimate it will take** to get from the present reality to your desired Goals and Achievements? *(This may be an important question for the leader to find out whether his/her timing expectations are in sync with the employee).*

### Share and Go

*(Share what you have learned from the interview and **validate** the skills, talents and underutilised talents presented by the employee. **Make an appointment to follow up. Turn this into practical action.** Schedule some things to explore/complete/deliver if appropriate)*

37. What, if anything, have you discovered from going through this Narrative Process?

Further Support:

First Step:

Meaning:

Difficulty of First Step

My role:

Time estimate:

Practical Actions and commitments: