

[video clips of a conversation check-in starting]

**Manager:** Hi, Dan, how are you today?

**Dan:** I’m great, thanks. I could be sleeping better - we just adopted a puppy and it’s whining all night.

**Manager:** Oh, that’s exciting though.

**Dan:** Yeah, it’s good that she’s cute. I am happy we get to talk today, I was hoping you might help me with my goal for my client error ratio.

**Manager Response Options:**

**A:** Ok, we can definitely discuss that. How are you doing so far?

**B:** Okay, we can certainly talk about it. It’s not really a challenging goal, though, is it? **(-10pts)**

**Dan response:**

Well, I am down to about a 7% error rate, but I can’t seem to eliminate those last 2 percent.

**Dan response:**

Well, my errors aren’t HIGH, I just can’t seem to get past these last 2%. I’m probably the only one.

**Manager Response Options:**

**A:** Ok, you need to reduce the rate by another 2%. About how many errors a month does that equal?

**B:** Yeah, that’s true. So maybe you should just talk to Janet? Her errors are almost 0. **(-10pts)**

**Dan response:** It’s about 10-15, depending on the month.

**Dan response:** Ok.

**Manager Response Options:**

**Manager Response:** Well, we also need to discuss your reporting. You turn your reports in late every month, and they need to be on time.

**A:** Okay, and do you know where most of your errors come from?

**B:** Well, that seems like it should be easy enough to overcome. **(-10pts)**

**Dan Response:** I think so. I tend to rush and flip numbers. I think I need to slow down and double check my work.

**Dan Response:** What? Well I know I was late last month, but it’s definitely not frequent.

**Manager Response Options:**

**A:** Okay. That sounds like a good solution. You can also check with Janet on how she manages errors. Let me know if you want to brainstorm additional solutions. Can we switch gears a little bit? I’d like to talk about your reports. They are frequently late, and it impacts the entire department.

**B:** Yeah, it’s not a race. That sounds like it will fix the issue. Now, about the problem with getting reports in on time.... **(-10pts)**

**A:** Unfortunately, it’s been 5 out of the last 6 months. When you turn reports in late, it really impacts the whole team. It can cause stress for other team members, cause others to be late with their reporting, or even prevent us from accomplishing everything we need to on time. Please get your reporting in on time.

**B:** Well, it is frequent. Just turn them in on time, OK? **(-10pts)**

**Dan Response:** Yes, I understand. I think I need to set reminders on my calendar so that I can start them earlier.

**Dan Response:** Maybe other people are turning in reports early so it appears that mine were late.

**Manager Response Options:**

**A:** It sounds like that may be the solution. I know several other team members use different solutions. Let me know if I can help brainstorm other reminders.

**B:** Whatever it takes. Just get them in on time, OK? **(-10pts)**

**A:** Well, I think we agree that it was late last month. When you turn reports in late, it really impacts the whole team. It can cause stress for other team members, cause others to be late with their reporting, or even prevent us from accomplishing everything we need to on time. Please get your reporting in on time.

**B:** I’m not here to debate with you. Just get them turned in on time. **(-10pts)**

**Dan Response:** I will. I think it’s a simple solution.

**Dan Response:** Fine, I will. Anything else?

**Manager Response Options:**

**A:** Okay. Well, that was everything from my notes. Anything else you need to discuss?

**B:** Alright. Great. Well, we’re done then. See you next time. **(-10pts)**  
**(END)**

**A:** How about if you try setting reminders on your calendar to alert you before they are due? And let’s follow up in 2 weeks and see how that’s working.

**B:** Nope. See you in a month. **(-10pts)**  
**(END)**

**Dan Response:** Okay, I will try that.

**Manager Response Options:**

**Dan Response:** Not today. Next month? Same time? **(END)**

**A:** Okay. Well, that was everything from my notes. Anything else you need to discuss?

**B:** Alright. Great. Well, we’re done then. See you next time. **(-10pts)**