

## People & Culture Leader Guide - Documenting Conversations

It is important for Leaders to document and record conversations for various reasons. Documentation provides evidence that conversations were had between Leaders and their employees, whether that be positive feedback or areas that the employee can work on.

### What to document

Leaders need to document employee performance, both positive contributions and performance failures. They need to document exactly what the employee did and said and what the manager did and said in response during the meeting or conversation.

### When to document

Documentation should be written during or immediately following the meeting or conversation with the employee. You should never miss writing down the conversation with the employee on the day when it actually happened. Waiting until later or the next day affects the quality of the documentation because it is based on what you remember.

One of the worst mistakes managers make is to believe that they can reconstruct an employee counseling history as needed.

### How to document

You need your documentation to appear professional, neat, and organized. Write documentation as if you are talking about the history of the happenings to a third party. You never know who may read your documentation one day, so make sure that it reflects your professionalism.

Your documentation should also be accurate and detailed enough to go to an employee's new manager if the employee obtains a new job—or you do—in your organization.

Write documentation that is factual, fair, legal, objective, complete, and consistent. Avoid opinions (Mike is sloppy. Alice is lazy. Tom was lying to me), name-calling, editorializing (John is a jerk. Mark has an attitude problem.), and labeling (Mary is irresponsible. George is not a team player.).

Avoid also trying to interpret the employee's behavior. (Marsha must not like this assignment. Paula appears to be in over her head.) Minimize your use of descriptive words such as adjectives and adverbs (slowly, sloppily, unhappy, moody, rude). State the employee's specific behavior and actions, not your opinion or interpretation of it.

When preparing the document, be sure to include:

- Employee's name and title
- Your name and title
- Full date
- Attendees to the meeting/conversation
- Details of the conversation

### Where to document

There are a few different tools that you can use to assist you with documenting conversations with employees.

Since documentation about employees is confidential and private to the employee, you need to take care that any documentation remains confidential to the manager, People and Culture, and potentially the employee's next manager. Documentation should be kept in the employee's personnel file.