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## Manager as Mentor and Coach Tools

### Making Clear Agreements

# Plan Your Agreement Content

## What, When & Who

Be specific and clear.

Share who should be involved.







## Why

Why is it important?







What will be gained?

What could the potential loss be?  
(Individual, Dept., and Company)

## How much WHY info?

Ability	Yes?	No?
Does the person doing the work have preferences or behavior style that fits with this task?	Give Less 	Give More 
Task	Yes?	No?
Is the task itself pleasant or appealing?	Give Less 	Give More 
Experience	Yes?	No?
Has the person doing the work done similar tasks or this task before without incentive?	Give Less 	Give More 

## How much HOW info?

Ability	Yes?	No?
Does the person doing the work learn things without guidance or by being provided a brief overview?	Give Less 	Give More 
Task	Yes?	No?
Has the person doing the work been formally trained or taught to do the task?	Give Less 	Give More 
Experience	Yes?	No?
Has the person doing the work done similar tasks or this task successfully?	Give Less 	Give More 

## How

Provide detail and direction.

Show shortcuts.

Share any preferences.

## Obstacles

What might get in the way?

What concerns do you and he/she have?

What are the contingency plans?

## Next Steps

Set up follow up.

# Hold an Agreement Discussion

## Include

*I'd like to make an agreement with you.*

*Let's discuss and I'll share information.*

*We will end with next steps.*

## Discuss

*WHAT I need from you is...*

*WHY this is important is...*

*This should be done by...(WHEN)*

*HOW I'd like this done is...*

*What CONCERNS do you have?*

## Summarize

*It sounds as if we have an agreement.*

*What are the key things you understand?*

## Thank and Next Steps

*Thank you for taking the time.*

*Let's get back together on...*

*Check back in and share how it's going on...*

## Communication Cycle in Agreement-Making



## Advocate

*What I need from you is...*

*How I'd like this done is...*

## Inquire

*What concerns do you have?*

*What else would be important for you to know?*

## Reflect

*You're concerned that...*

*You wonder if you could try...*

*You are excited about this because...*

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# First, Plan

What, When & Who

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Why

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How

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Obstacles

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Next Steps

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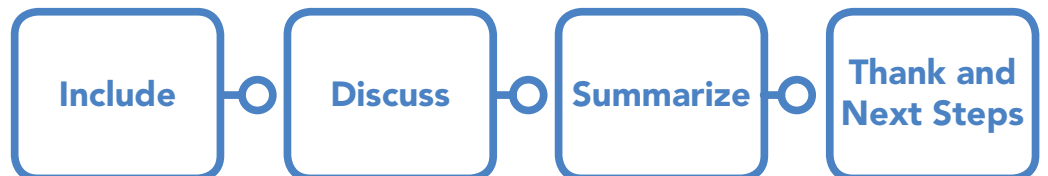
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## Then, Discuss



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## Did it? Reinforce.

### What

Describe the agreement.

Give an example.

*We had discussed you...  
(agreement).*

*You handled it...*

OR

*It was done right on time  
(etc.)...*

### Why

Describe the impact.

Provide a benefit.

Give an example, if possible.

*This meant that we were able  
to...*

OR

*Because of that, I was able to...*

OR

*So, the team was able to...*

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## Didn't do it? Remind.

### What

Give a short, factual message.

Reflect response.

*We had discussed you...  
(agreement).*

*I noticed that this wasn't done...*

*Reflect response(s).*

### Obstacles

Did person simply forget?

OR

Did a real obstacle emerge?

*Sounds as if you just forgot.*

OR

*Sounds as if this got in way...*

### Regain commitment.

*You'll do...so that it is finished  
by...*



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