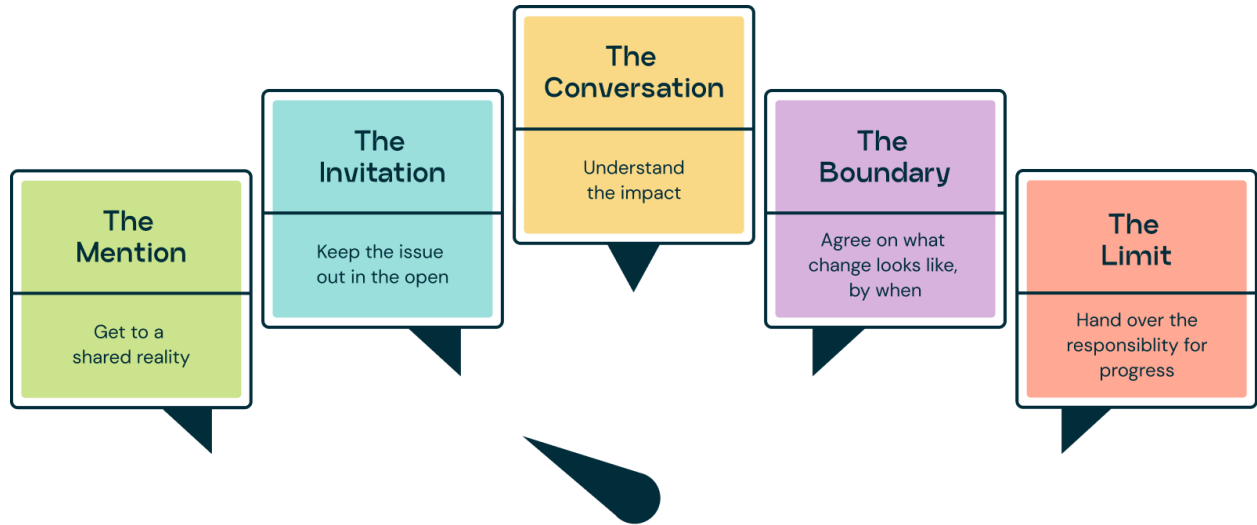


# Accountability Dial



Use these step-by-step worksheets to help you walk through the entire process and give you step-by-step instructions on how this might apply to your situation.

## The Accountability Dial is...

- A compass and not a map. Its situational and adaptable to fit the context
- A guide for intervening early
- Provides a common language rooted in plain language
- Invites self-reflection, not self-protection
- Keeps the focus on impact rather than intentions
- Should be used for both corrective and complimentary feedback

## How to use the following worksheets:

1. Determine where you are in the process
2. Prepare for an accountability conversation
3. Build a plan for growth through accountability

# The Mention



**“Hey, do you have a second?”** The Mention is essential because it creates space for your teammate to consider *what* you have to say *without* feeling threatened.

**Definition:** The Mention is a *brief* question or observation about what you see. It starts from a place of curiosity; you just noticed something and want to start a dialogue. You may not have all the data at this point, and that’s okay.

**Mindset:** Start from a place of curiosity. You see something and want to start a conversation. You don’t have or need all the data.

**Ownership:** Your goal is to create a shared reality. You don’t have to agree, but confirm that you’re talking about the same thing.

**Most common Mention mistakes**

1. Filling the silence
2. Expecting an immediate response
3. Making it a “we” thing

**Tips**

- Keep it short
- Try to start with an “I” statement or question
- Don’t expect or push for a response right away
- Give the recipient space to think
- Remember to listen

**What it sounds like:**

<p>“Hey, do you have a second? There’s something I’m seeing that I want to ask you about.”</p>	<p>“You handled that tricky conversation well. I could see that [name] felt respected and heard.”</p>
<p>“That was a great email to the team. Your message was clear and helpful.”</p>	<p>“You seemed frustrated at this morning’s stand-up. Anything you want to talk about?”</p>
<p>“Hey Jeff, I noticed you turned in your timesheet late this week. Is everything okay?”</p>	<p>“I saw a flurry of emails come through overnight. Was there anything interesting in there?”</p>

## What it doesn't sound like:

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"I noticed a few typos in the proposal that's about to go out. I was wondering if you saw them? Because if you didn't, I totally get it - we're all so busy - but it's super important that we have super clear messaging from our department. You know, because we are the communications department, and people look to us as an example. But anyway, the typos - are you too busy or is something else going on? Do you need to have Sandy double-check them before you send them out? Blah, blah, blah, blah, blah, blah..... insert more filler phrases, assumptions, solutions, etc..."

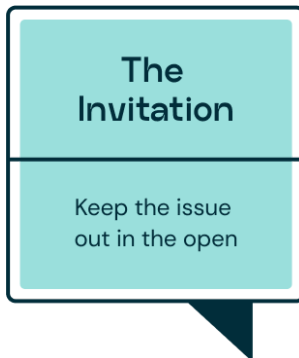
## Practicing the Mention

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**Scenario 1:** One of your employees, Sam, submitted a cost-estimate report to you a day and a half after the agreed-upon deadline. It's not a crisis, but there was no communication about the delay - he simply sent it in late. How could you use a Mention to address this with Sam?

**Scenario 2:** One of your direct reports, Kayla, is often on her phone when she is walking the halls of the factory. With her head down, she bumped into a co-worker while walking around a corner. How could you use a Mention to talk about this with Kayla?

# The Invitation



**“Did you get a chance to think about our conversation the other day?”** The Invitation helps your teammate to see a pattern of behavior for themselves.

**Definition:** A short interaction to help your teammate see a pattern of behavior and to invite self-reflection.

**Mindset:** You see a connection between isolated events and want to help your teammate with what could be a growth opportunity.

**Ownership:** You want your teammate to acknowledge a pattern and commit to reflecting on it.

### Rules for Using the Invitation

1. It should take place one-on-one
2. You’re not being authoritative or punitive—you’re investing in them
3. Try to point to observable facts or data that can help them see the pattern themselves.
4. Avoid absolutes like “never” or “ always”

### Tips

- Most people need others to discover important growth themes.
- If you want someone to be more engaged, be more engaged with them.
- Don’t fall into the trap that it’s too small or no big deal. Invest a few minutes to help them.

### What it sounds like:

<p>“Remember that comment I made about the typos in the newsletter the other day? I saw a few more in the memo to the sales team that you cc’ed me on. Did you notice them as well?”</p>	<p>“I’ve noticed you’re spending extra time helping team members troubleshoot lately. Thanks so much for following through consistently on that goal we set.”</p>
<p>“I didn’t hear back from you about trouble tickets. Did that get resolved? I was wondering about where it went after we talked.”</p>	<p>“I noticed that this is the third week in a row that you turned in your timesheet late. I think I’m starting to see a pattern. What might be going on here?”</p>

## Practicing the Invitation

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### Scenario 1

It's one week later, and one day *after* Sam was supposed to send you a summary of the information you'd requested. Additionally, another team member has shared frustration over Sam's inability to complete tasks on time. How could you use an Invitation to move things forward with Sam?

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### Scenario 2

A week has passed, and while you haven't seen Kayla walking with her eyes focused on her phone, you did observe her walking outside the designated lines on the factory floor. How could you use an Invitation to prompt Kayla to look for a pattern or theme?

# The Conversation



**“Are you open to deeper coaching around this theme?”** The purpose of the Conversation is to help your teammate get traction by focusing on the impact.

**Definition:** A short conversation to unpack the pattern by asking questions that move the focus from intention to impact.

**Mindset:** You’re aware of the impact this behavior is having and you want to help your teammate take ownership as it becomes more urgent.

**Sounds like:** “I want to help you make progress on this—focusing on impact helps to make it actionable.”

**Ownership:** Your teammate gains new awareness of how they are impacting others and are motivated to change.

## Questions for the conversation

1. How might this be impacting your team?
2. How might this be impacting our customers?
3. How might this be affecting our relationship?
4. How might this be holding you back in your own growth?

## Tips

- Avoid being formal. You’re creating more space to discuss.
- Don’t expect big declarations about change. Have the Conversation, then take a break.
- Make sure you get to the heart of what you really want to help this person see.

## What a Conversation might sound like:

### Initiate the Dialogue

*“Hi Jeff! I know that we’ve talked about your timesheet a couple of times. I wanted to continue the conversation during our one-on-one meeting today. How does that sound?”*

*“That sounds okay.”*

*“Great. How has it been going since our last conversation?”*

*“I feel like I’ve been doing better, though I know it’s not consistent yet. But I’m really trying.”*

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### Explore the Impact

*"Jeff, I can really see that you're making an effort. I'm curious—what's the impact for you when timesheets aren't submitted? What's the impact for the team?"*

*"I'm probably not hitting my utilization numbers, which means I am not getting the bonuses I could be...it could also make our overall metrics look poorer than they actually are, which isn't fair to the team."*

### Invite Self-Reflection

*"I think that's a fair assessment—you are losing credit for the work that you are doing, and it is affecting your team's overall metrics. Is this something you'd like to change?"*

*"Well yes, of course! But I'm struggling to make it happen."*

*"Hmm, okay. I would love to understand more. What do you think is getting in your way?"*

*"It's hard to say. I feel anxious about missing these deadlines but somehow I can't keep track of them."*

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### Make a Plan for Progress

*"Okay, it sounds like this is something you want to work on, which is great. I appreciate your honesty, and understand that we all struggle with certain things. What do you need to help you submit your timesheets on time every week?"*

*"I know some of my team members are great about filling out their timesheets so I might check in with them. It would probably help me to schedule time in my calendar each day just for completing my timesheet, too."*

*"That sounds like a great idea."*

*"How do you want to continue to stay engaged around this topic?"*

*"This was helpful, I'd love to touch base during our one-on-ones."*

*"Perfect, that sounds great."*

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### If It's Helpful, Document the Plan.

*"I know we are both busy and would love to get this written down so neither of us forget. Can you send me an email with your plan?"*

*"Sure thing!"*

## Practice the Conversation

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### Scenario 1

One month has passed since your initial Mention to Sam. He has continued to struggle with meeting deadlines for team projects. Sam is a solid performer and a well-liked team member except for his inability to submit work on time. How could you have the Conversation with Sam to help him take ownership of this theme?

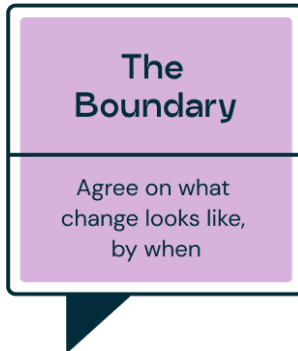
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### Scenario 2

Two weeks have gone by since your last talk with Kayla about safety. Last week she seemed to be more conscientious of walking through the factory, but this week you've noticed her gazing off and not seeming to pay attention during shift change. How could you use the Conversation to help Kayla take ownership of this theme?



# The Boundary



**“What would a consequence look like to help you make this change?”** A Boundary can be a gift– it creates a sense of urgency to break an old habit or pattern.

**Definition:** A short dialogue to agree on what behavior needs to change, by when, and what the new behavior looks like.

**Mindset:** A critical moment to put positive pressure on this person to grow.

**Sounds like:** Ideally authored by them: “Over the next 30 days, I’m committed to [actions] and I understand [agreed upon consequences].”

**Ownership:** Your teammate changes the behavior in the agreed upon time frame.

## Questions for the conversation

1. Be specific and create measurable outcomes (even if they aren’t numbers based).
2. Be realistic with your timeline for change.
3. Define the consequences and be honest about how you’re feeling.

## Tips

- This is not a performance improvement plan, it’s coaching for someone you care about.
- The process isn’t always linear. You may need to return to the Conversation before proceeding.
- The Boundary is a formal agreement between you and your teammate.

## What it sounds like:

### Reopen the Discussion

*“Hi Jeff! I wanted to connect regarding your timesheets again. Do you have 30 minutes this afternoon to chat?”*

*“Sure, I can chat.”*

### Align on the Issue

*“Jeff, I’m still not seeing the consistency that we’re looking for with your timesheets. I wanted to check in with you about the plan you set for yourself in our last conversation. How is it going?”*

*"I feel like things were going better for a little bit after our last conversation. I was really able to consistently submit my timesheets every week, but when the busy season came around, I just didn't feel like I had the time to create the timesheets and it felt more important to get my other work done."*

*"We really appreciate the work that you have been doing during this busy period, Jeff, but your timesheets are still a top priority. As you mentioned during our last conversation, not submitting timesheets has an impact on your utilization numbers, which affects your bonus. What does that mean for you?"*

*"Well, I wanted to take my family to Hawaii this year, but without the bonus I couldn't justify it. My wife got pretty angry."*

### **Setting the Boundary**

*"That's really frustrating. It shows that this issue is not only affecting your work, but your home life, too. I'd like to talk through what comes next. We need to decide specifically what needs to change, when that change should be accomplished, and what the consequences are if that change isn't made. Does that sound reasonable to you?"*

*"Of course."*

*"Great. As a team we decided that timesheets need to be turned in on Fridays by 10 AM PST. Do you still think that's a fair ask?"*

*"Yes."*

*"Great. How long do you think this change will take?"*

*"Hmm. Probably seven or eight weeks."*

*"Tell me more. What does that look like for you?"*

*"It gives me time to set up a new system for making sure I submit my timesheets. My intention is to submit them on time every week, but I'd like the space to try out a new approach if that is okay with you. By the end of eight weeks, I will have reached a process that makes sure I submit them on time."*

### **Defining the Consequences**

*"Okay, great. What happens if you don't turn in your timesheets on time?"*

*"I'm not sure. What do you think should happen?"*

*"Hmm. I'm happy to provide guidance, but I'd like you to think of a boundary that makes sense to you."*

*"Well, maybe it's taking me off the Austin project. But you know, I'd love to think about it a little."*

*"That makes perfect sense to me—let's agree for now on the Austin project, but do spend some time thinking about it. When can you let me know your decision?"*

*"I appreciate your flexibility.. I think I could get you a response by Friday."*

### **Next Steps**

*"Sounds great. How do you want to connect on this topic moving forward?"*

*"Let's chat in our next one-on-one."*

*"Great. Thanks for your time, Jeff. I'm glad we could make a plan for improvement."*

## **Practice the Boundary**

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### **Scenario 1**

It has been six weeks since the initial Mention to Sam, and his inability to submit work on time is disrupting progress on an important team project. He recently dropped the ball on submitting metrics that were crucial to a project update, leaving the team scrambling to provide a client a substantive progress report. How could you collaborate with Sam to create a Boundary that will push him to take ownership of this change?

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**Scenario 2**

Another two weeks have passed since you had a Conversation with Kayla, and while you believe she is *trying* to improve her attentiveness, you have not seen results. Her tendency to be distracted on the factory floor is not only an issue of work ethic, but an issue of safety. How could you work with Kayla to create a Boundary that motivates her to *own* this behavior and commit to changing it?

# The Limit



**“I feel like I am out of options.”** Letting a teammate know when you are at your Limit is an expression of care. It’s a critical step in human motivation.

**Definition:** A clear statement that you are stepping out of a coaching role—that the next step is on them.

**Mindset:** You’ve done everything reasonable to help them grow and you’re willing to see what they do next.

**Sounds like:** “We agreed [action, behavior or situation] would happen, but you haven’t made (enough) progress. I’m looking to you at this point to see what is left for us to do here.”

**Ownership:** Your teammate finally gets the importance of the change and comes back to you with insight as to why they’ve been stuck until now.

## Tips

- The spirit of the Limit is care—nobody wants to work on a team where they feel like they’re failing.
- Recap the conversations you’ve had so far to recap where you’ve been.
- It’s often a good opportunity to talk through the situation with a trusted third party to check your assumptions.
- Give them space to consider the situation. You’ve made a shift and they may need time to process and get help from others.
- Watch out for backsliding or making excuses to avoid the natural discomfort

## What it sounds like:

### Recap and Resolve

*“Jeff, we have discussed your timesheets a few times in the last few months, and I’m not seeing the change we agreed on last time. I’m not sure what else to do, because it doesn’t appear that my coaching is having an impact. I want you to think about this project and your position. What do you want to get out of your career here? What does your future look like? Take the weekend to think about it, and let’s connect on Monday.”*

*“Well I feel like I only missed 3 timesheets in the last 8 weeks—which is a huge improvement from last year.”*

*“Jeff, while that is progress, it simply isn’t meeting the standards we discussed.”*

*“I just feel like Rebecca doesn’t turn in her timesheets consistently and you haven’t taken this kind of drastic action with her.”*

*“Jeff, this conversation is focused on you and your growth. I know you can do better—but the next steps are up to you.”*

## Practice the Limit

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### Scenario 1

Though you did discuss a Boundary with Sam to push him to improve his time management, he never submitted a plan for making a change, and there has not been a noticeable difference in his behavior. Though Sam is a well-liked member of the team, these incidents have frustrated his colleagues (not to mention you). Difficult though it may be, this leaves one option—setting a Limit. What would you communicate to Sam in your Limit discussion?

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### Scenario 2

Kayla *did* commit to a Boundary in your last discussion, but she has not followed through with her plan for change. In fact, she was distracted enough this week that she forgot to do a routine safety check on before beginning a shift, causing a delay in production. The impact this has on personal safety and productivity is not sustainable, and a Limit must be asserted. What would you say to Kayla in your Limit discussion?