

University of California

UC Experience Conversations

Enhancing the workplace experience, one conversation at a time.

UC Employee Experience Conversations Defined

1:1 conversations held at least once annually between managers and employees during a regular 1:1 check-in conversation – *not during a performance review.*



UC Experience Conversations are opportunities to revisit and explore what is critically important to employees – *thinking about their satisfaction, engagement, and motivations at work.*



These conversations are also a chance for managers to get a better sense for supporting each employee – *thinking of championing efforts, career development, inclusion, belonging, and retention.*

UC Experience Conversation Process

Is...

- Focused on the employee experience
- A two-way conversation between employees and managers
- A chance to build and refine relationships
- Focused on employee needs, goals, aspirations, inclusion, and opportunities to retain.

A chance for managers and employees to exchange feedback about what could or should stay the same, and what could be different for a better overall workplace experience.

Is not...

- A formal performance review with ratings
- A process that requires reporting to a system

Instead, organization leaders may be interested in learning about key takeaways from the conversations that could help with addressing broader talent and workforce challenges and opportunities.

High Level Before, During, After

Before

- Managers and employees, take some time to prepare, reflecting on the questions and thinking about which 3-5 you would like to address in the conversation.
- Plan to hold the conversation during a regular 1:1. Be sure to schedule enough time, hopefully an hour to give space for conversation.

During

- Be open and honest. Discuss and explore tangible challenges and opportunities.
- Exchange your follow-up items as agreed upon.

After

- Be ready to have scheduled follow-up conversations and planning as needed.
- Take follow-up actions as agreed upon during the conversation.

Before – UC Experience Conversations

Manager

- **Invite** – using the template on the resource webpage, invite employees to their UC Experience Conversation.
- **Select** – about 3-5 questions you would like to ask each employee. These will likely be different for each employee. So, think about the information you need most from each individual. Be sure your employees know they should choose about 3-5 to address in the conversation as well. Let each employee know which questions you are planning to ask so they can think through their answers.
- **Create** – an environment where your employees feel comfortable sharing. You can do this by expressing how you value their insights, experience, and hope to learn more about what you can do as a manager to better support their overall day-to-day at work.

Employee

- **Consider** – the invitation to your UC Experience Conversation, and what you are seeking in your role.
- **Think** – about what is happening between you and your manager, in the organization, your colleagues, your clients, and how your work might be impacted.
- **Select** – about 3-5 questions you would like to address. Your manager will also be selecting some questions to ask of you. Connect with your manager ahead of time to indicate which questions you want to focus on during the conversation.

During – UC Experience Conversations

Manager

Discuss the purpose of the conversation and revisit what the conversation is and is not. Then, talk about the elements of the conversation:

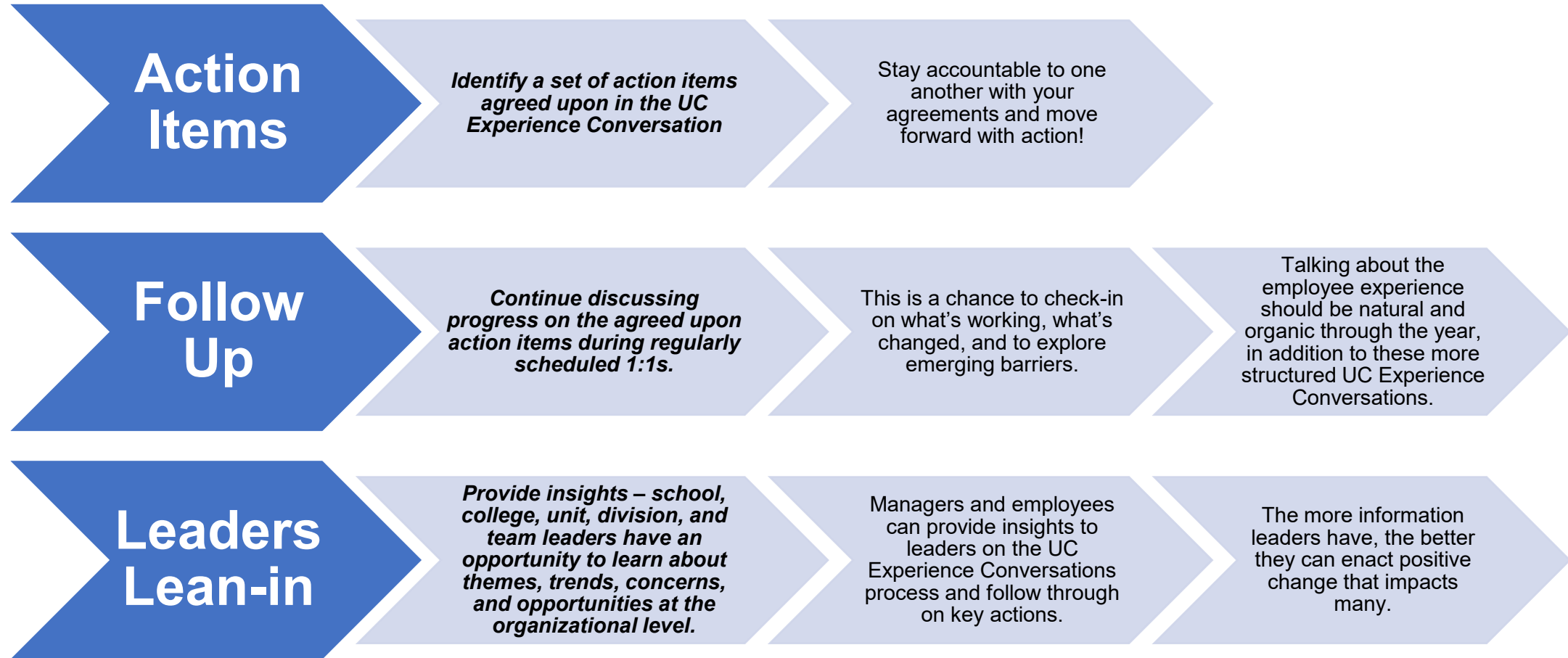
- **Check-in** on the questions both you and the employee hope to cover.
- **Express** how you hope there is an exchange of honest, thoughtful, and constructive feedback.
- **Focus** on addressing the overall employee experience – thinking about your relationship and their experience in the role.
- **Work together** with each employee to identify opportunities to enhance the employee experience and stay accountable to agreed upon actions.
- **Ask** employees what questions they might have about the conversation.

Employee

Let your manager know what questions you have about the conversation, Then...

- **Remind** your manager what questions and topics you hope to cover in the conversation.
- **Express** openly and fully with the vulnerability boundaries that make sense for you.
- **Detail** specifically what could be better, different, or even the same to enhance your overall employee experience day-to-day, and in your long-term career.
- **Use** the list of questions as your note taker and action planner.

After – Managers, Employees, Leaders



Manager and Employee Interaction



Two-way

Active listening

Clarification

Exchange of feedback is truly two-way

Openness

Mindful of impact

Eager to understand pain-points, priorities, and motivations

Receptive

Alignment

Understanding

Agreement

Acceptance

Thoughtful communication

Focus on the speaker, allowing for most of the expression to come from the employee

Do. Not. Interrupt. Give space for clarifications or corrections when the person is done speaking

Allow the conversation to flow —if important items are missed, schedule more time

Pause and give space for processing and silence – go through questions one at a time

Ask for insights, perspectives, and feedback

More on Thoughtful Communication

Clarifications

- “Are you saying...” OR, “I’m going to repeat what I noticed you said...”
- Paraphrase a summary of part of the conversation and ask, “Is that about right?” OR, “I hope to understand XYZ better. Can you tell me more about XYZ?”

Engagement

- Be present with your attention fully in the conversation (minimize distractions and multitasking. Use supportive body language.
- Utilize the eye-contact comfortable to you, as you are able.
- Do your best to prevent interruptions. Be kind and roll with interruptions as they are presented.

Diving Deeper

- “Tell me more about...”
- “Can you explain a bit more about what you mean?”
- “What is an example you’d like to share?”
- “If yes, how?” “If not, why not?” OR, “What is preventing XYZ?”
- “What might that look like?”

Receptivity

- Have a person-centered approach. Adjust to individual needs.
- Develop action plans, give space for further reflection and processing, while also holding each other accountable to what’s still in progress.
- Exchange insights, perspectives, and feedback.

Ask:

What could I start doing? *How could I better support you?*

What could I stop doing? *What would you appreciate me doing differently?*

What could I continue doing? *What am I doing now that is adding value?*

A Person-focused Process

Be flexible - *some may be hesitant to participate.*

- This is a great opportunity to lean-in! Learn about concerns, discuss the process, clarify expectations, and reschedule as shifting priorities are presented.

Be empathetic – *people might experience nervousness and/or anxiety related to the conversation*

- It's totally fine to take a break and come back to the conversation. Be sure to refer to appropriate resources as applicable to the situation.

Be real – *do your best to work with each other on tangible adjustments and actions.*

- Focus on challenges that can be addressed within appropriate scope of control. And, communicate if issues need resolving by another process.

What People are Saying...

Discussing new topics

"Though my supervisor and I meet regularly to discuss my performance related goals, this was the first time we spoke about my employment experience a whole. It was meaningful to me to have a place to explain my thoughts and experiences in this context and know it is tied to a larger goal."

Learning more

"I thought getting to know what is important to my direct report was a wonderful way to know what motivates her and drives her for success. We were able to talk about things we typically don't cover in our regular check-ins. It was an awesome discussion."

Planning for the future

"It was a great opportunity to connect with my manager on my career and strategize on the bigger picture for my role and the department."

Building relationships

"My boss took the time to cater the conversation to my world. Life changing conversation. We took an already good relationship to a deeper level of honesty and future building."

Systemwide Resources

Systemwide Learning & Development Programs and Resources

<https://ucnet.universityofcalifornia.edu/working-at-uc/your-career/talent-management/index.html>

My UC Career

<https://ucnet.universityofcalifornia.edu/working-at-uc/your-career/my-uc-career.html>

Connect to Your Local HR Team

<https://ucnet.universityofcalifornia.edu/contacts/campus-contacts.html>

For Managers, Leaders, and HR Leaders

10 Ways to Set Context and Guide the Process at Your UC Location

10 Ways to Set Context at Your UC Location

1

• **UC locations are encouraged to provide "local" context** on how these conversations play a role in enhancing the employee experience, and how they fit in or build upon organizational initiatives and goals.

2

• **Create space for learning about the process.** Locations can hold workshops, information sessions, and 1:1 opportunities to learn about UC Experience Conversations. Reach out to your HR teams to get support here!

3

• **Communicate how UC Experience Conversations are NOT evaluative conversations**, though they can be used as an approach to take future employee planning conversations to a deeper level.

4

• **Frame that a best practice is to offer the conversation as part of a regularly scheduled 1:1.** These questions can be revisited or discussed at any time, and that you do not have to stick to only discussing these types of open-ended questions only once per year.

5

• **Leaders lean-in!** While these are 1:1s between employees/managers, leaders are encouraged to explore themes, trends, issues, and opportunities at the organizational level -- in addition to doing their best to support managers' follow through on key actions with employees.

10 Ways to Set Context at Your UC Location

6

- **Employees can share insights too!** Organizational leaders and/or HR might ask for employee's insights on the UC Experience Conversations process.

7

- **Consent is a must.** Ask if employees are comfortable having the conversation. Talk to employees first and use the template for managers to invite employees to the conversation. The template also includes details on preparing and following up.

8

- **Consider timing, organizational, relational, and personal factors.** The discretion rests with leaders and managers. The intent is to offer the conversations to everyone, so we facilitate opportunities to enhance the employee experience. And, if there are factors that would prevent a productive dialogue, it is recommended to offer the conversation at a different time when conditions are better.

9

- **These conversations are not just for high potentials, successor candidates, or flight risks.** UC Experience Conversations should be offered to everyone on a team if the conditions for a successful conversation are in place.

10 Ways to Set Context at Your UC Location

10. *Can others be invited into the conversation?* The design of UC Experience Conversations is set up to facilitate a two-way manager and employee conversation and planning process.

10a - Manager's manager?

- We encourage employees who are reluctant to address their concern with their manager. Employees can always reach out to their manager's manager and/or HR to express concern when elevation is needed.
- And, situations will need to be handled case-by-case. It is possible that through the conversation, an action item could be to speak to unit leadership or other colleagues and teams to broaden the career development network, get feedback, and to participate in ongoing succession planning within the organization.
- Employees should be reminded of the reporting and confidential resources available at your location.

10b - Multiple managers?

- If an employee reports to multiple managers, check with the employee on their preferences for meeting with their managers separately or together.

10c - HR and/or Learning & Development?

- While teams can always invite HR and/or Learning & Development staff into team discussions, the design of this conversation process is set up to be held between managers and employees.
- HR and/or Learning and Development leaders could work to adapt the process to hold more structured retention or engagement interviews.

Additional Resources for Managers

- [Wellness in the Hybrid Workplace](#) - 2021 Northern California UC-Coro Systemwide Leadership Collaborative (pdf)
- [Career Advancement Scenarios](#) - 2021 Southern California UC-Coro Systemwide Leadership Collaborative (pdf)
- [Career Advancement Decision Tree](#) - 2021 Southern California UC-Coro Systemwide Leadership Collaborative (pdf)
- [Talent Planning Worksheet](#) - 2021 Southern California UC-Coro Systemwide Leadership Collaborative (pdf)