

**CHALLENGE CONVERSATION PROGRESS REPORT (SAMPLE)**

JANUARY 2018

LABOR RELATIONS INSTITUTE

rating after session*	PARTICIPANT	OVERALL EFFECTIVENESS	APPROACHABILITY / CONNECTION	SUBJECT KNOWLEDGE	COMMITMENT	NEXT STEPS
1	<u>Doe, John</u>	<ul style="list-style-type: none"> <li>No basis to judge</li> </ul>	<ul style="list-style-type: none"> <li>Distracted</li> <li>No eye contact</li> </ul>	<ul style="list-style-type: none"> <li>Showed limited grasp in this session</li> <li>Gaps in knowledge</li> </ul>	<ul style="list-style-type: none"> <li>Unprepared</li> <li>Did not call in until texted</li> <li>Had not read scenario email</li> <li>Disinterested in feedback</li> </ul>	<ul style="list-style-type: none"> <li>Reevaluate</li> </ul>
2	<u>Johnson, Jane</u>	<ul style="list-style-type: none"> <li>Good communicator but until she has more solid footing in the law and the process she won't be a credible source of information.</li> <li>No previous union experience</li> </ul>	<ul style="list-style-type: none"> <li>No eye contact – writing during session</li> <li>Listening skills seem good as she responded to the specifics of questions</li> <li>Manner seems open and approachable</li> <li>Not afraid to say she doesn't have all the answers but will get them.</li> </ul>	<ul style="list-style-type: none"> <li>Requires support (materials and/or coaching) to feel confident with the subject matter and how a union would impact a worksite.</li> </ul>	<ul style="list-style-type: none"> <li>Well prepared.</li> <li>Signed in early to check tech</li> <li>Read her notes from RRT training to prep for the call</li> <li>Eager for feedback</li> <li>Asked for learning tools</li> </ul>	<ul style="list-style-type: none"> <li>Shadow peer in union shop?</li> <li>Web training, all topics</li> </ul>
3	<u>Monroe, Jim</u>	<ul style="list-style-type: none"> <li>He will be far more effective when relaxed.</li> <li>Didn't mention his own experiences which are valuable.</li> <li>Missed opportunities others took to make a solid persuasive point.</li> </ul>	<p>Seems personable and approachable but a little too guarded in this initial conversation. May just need to become more comfortable with the video format.</p>	<ul style="list-style-type: none"> <li>Understanding seems solid</li> <li>Would benefit from some practice in talking more comfortably about the realities of collective bargaining and his own experiences with unions.</li> </ul>	<ul style="list-style-type: none"> <li>Prepared and on time</li> <li>Open to feedback</li> </ul>	<ul style="list-style-type: none"> <li>Focus on approachability and listening skills</li> <li>Challenge to talk about his own experiences</li> </ul>
1	<u>Roosevelt, Ted</u>	<ul style="list-style-type: none"> <li>Seems unaware he is ill-informed on most issues.</li> <li>Weak arguments create persuasive opportunities for union supporters</li> </ul>	<ul style="list-style-type: none"> <li>Difficult to judge without video but he seemed relaxed and easy to talk to.</li> <li>Could be a credible source of <u>disinformation!</u></li> </ul>	<ul style="list-style-type: none"> <li>Significant gaps in understanding and judgement</li> <li>Example: Said under a contract employees would probably "make a couple bucks more" but after dues it "would only be a dollar or so more which isn't all that much"</li> </ul>	<ul style="list-style-type: none"> <li>Unprepared</li> <li>Missed start time, needed text prompt</li> <li>Had to reschedule</li> <li>Had not seen scenario email</li> <li>Could not get video to work</li> </ul>	<ul style="list-style-type: none"> <li>Reevaluate</li> </ul>

\* Ratings: 5 is high, 1 is low. 5 = Deployable campaign asset with minimal support 4= Deployable with support; some skill building required 3= Not ready for campaign conversations but can be developed 2 = Some promise with significant gaps in knowledge or conversation skills 1 = May not be best investment of RRT resources

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5	<u>O'Conner, Sandy</u>	<ul style="list-style-type: none"> <li>Effortless in hitting all the right notes</li> <li>Knows the subject and used the most persuasive arguments</li> </ul>	<ul style="list-style-type: none"> <li>Good eye contact</li> <li>Missed a few opportunities to personally connect</li> <li>Jumped into talking points too early without first making a human connection</li> <li>Did not set up a follow up conversation</li> </ul>	<ul style="list-style-type: none"> <li>Seems to know the subject so well she is relaxed and creative in making persuasive points</li> </ul>	<ul style="list-style-type: none"> <li>Rescheduled</li> <li>Responded well to feedback</li> </ul>	<ul style="list-style-type: none"> <li>Challenge with interactions that require personal connection and follow up</li> </ul>
4	<u>Truman, Hank</u>	<ul style="list-style-type: none"> <li>Stumbled slightly on terminology but otherwise solid</li> <li>He will be more credible when relaxed -- discomfort with video format.</li> </ul>	<ul style="list-style-type: none"> <li>Can talk too much.</li> <li>Needs to shorten his answers to leave more time for interaction.</li> </ul>	<ul style="list-style-type: none"> <li><b>Seems knowledgeable and knows when he needs to choose his words carefully.</b></li> <li>Did a solid job handling the trick question "will we lose clients if we go union?"</li> </ul>	<ul style="list-style-type: none"> <li>Well prepared and on time.</li> <li>Took critique well and offered to work on shortening up his answers on his own</li> </ul>	<ul style="list-style-type: none"> <li>Challenge him with interruptions and noisy environment</li> </ul>
3	<u>Wilson, Woody</u>	<ul style="list-style-type: none"> <li>He will be very effective if he works on his approachability.</li> <li>Managerial demeanor that could leave voters reluctant to fully trust him or open up to him</li> <li>Example: he invested much of his conversation time in the downsides of seniority without first asking the employee (me) how long she was with the company.</li> </ul>	<ul style="list-style-type: none"> <li>Weak eye contact could be caused by the technology.</li> <li>It seems you can see him thinking through his answers in a way that could come off as duplicitous</li> <li>He needs coaching on staying present with the person in conversation and not drifting into problem solving mode.</li> <li>He missed several opportunities to connect.</li> </ul>	<ul style="list-style-type: none"> <li>His grasp of what it's like to work and manage under a contract is invaluable.</li> <li>.He would benefit from thinking through in advance the implications of some of his answers; he tends to explain a lot more than needed to make a point and does not consider the audience.</li> <li>His real life experience need to be boiled down to succinct compelling observations.</li> </ul>	<ul style="list-style-type: none"> <li>Well prepared and on time</li> <li>Interested in improving but clearly overwhelmed by other commitments</li> </ul>	<ul style="list-style-type: none"> <li>Challenges that require personal interaction</li> </ul>
5	<u>Yang, Chris</u>	<ul style="list-style-type: none"> <li>Chris is a rock star!</li> <li>Makes the response relevant and real for the employee</li> <li>Senses the strongest argument to make</li> </ul>	<ul style="list-style-type: none"> <li>Authentic, credible, easy to talk to.</li> <li>Good listener.</li> <li>Engaged me, used my name, relaxed.</li> <li>Down to earth. ALL GOOD.</li> </ul>	<ul style="list-style-type: none"> <li>Stayed inside the lines and seemed to know just where they were.</li> <li>Recognized what he couldn't say when I tried to trip him up.</li> <li>Solid.</li> </ul>	<ul style="list-style-type: none"> <li>Well prepared and on time</li> </ul>	<ul style="list-style-type: none"> <li>Could mentor others</li> <li>Challenge with campaign coaching and leadership questions</li> </ul>