



BRIEF

Quarterly Discussions

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"Average players want to be left alone. Good players want to be coached. Great players want to be told the truth." — Doc Rivers

Introduction

We're huge believers in feedback (though we actually prefer the word feedforward), especially one-on-one conversations that make sure leaders and their direct reports are in sync on the roles, accountabilities, and responsibilities (RARs) associated with their respective seats.

Quarterly Discussions should include a conversation about how well the team member embodies the organization's [Core Values](#) and how well they complete their [Rocks, To-Dos](#), and [key performance indicators](#) (KPIs). Leaders also discuss what they owe their team

members as leaders and coaches.

Ninety aims to help leaders build extraordinarily focused, aligned, and thriving organizations. Quarterly Discussions are essential to achieving all three.



Context

Many companies rely only on annual performance reviews, but we encourage people to provide feedback at least quarterly (we call these Quarterly Discussions) and even more often during onboarding or if there are performance issues.

Solely undertaking annual performance reviews has several inherent issues:

1. Waiting an entire year to let a team member know how things are going is less than optimal because of recency bias, or the tendency to focus on recent events or activities rather than overall cultural fit and performance.
2. Annual reviews tend to be one-way conversations rather than constructive dialogue.
3. Leaders miss out on opportunities for coaching, course-correcting, and staying genuinely connected with their team members throughout the year.

Think of the Quarterly Discussion as a formal “I genuinely care about you” check-in.

The formal nature means leaders and coaches are committed to embracing their responsibility to help people grow. They’ve agreed to help people expand their experiences and competencies, making them more valuable in the marketplace. Great coaches care about the person in front of them and the person they can become.

Tool Overview

Ninety’s 1-on-1 tool was built to support productive, documented Quarterly Discussions. A great Quarterly Discussion starts with both parties getting prepared. This should include reviewing how each party is doing with their respective seat, plus completing a standard set of questions that provide the foundation for a great conversation. (Ninety helps you get started with a recommended set.)

The conversation begins with an overview of how the team member aligns with the company’s Core Values. If the team member isn’t living up to them, that’s a red flag. A misalignment here is a serious concern, so the leader must prepare specific examples and ideas for corrections.

Next, consider how the team member performs the roles, accountabilities, and responsibilities outlined on the [Org Chart](#).

1. **Are they competent?**

Do they understand their responsibilities and why they are essential to the company? Do they have the requisite experience and competencies to perform their responsibilities?

2. **Are they committed?**

Are they passionate about fulfilling these responsibilities, mastering the required skills, and growing with the seat as the company grows?

3. **Do they have the capacity to get it done?**

Do they have the mental, physical, emotional, and time span capacities to meet the demands of their seat? Do they also have enough time in the week to meet those demands?

Next, we recommend moving to discussions around performance during the period (hopefully about 90 days). Did they have minimal setbacks in the process of meeting the KPIs and targets associated with their seat? Did they complete the Rocks they took on?

Ninety's 1-on-1 tool, which we use to conduct our Quarterly Discussions, also provides a summary of how often a person completes their To-Dos on time. While To-Do stats may seem too granular, they are [agreements](#), and others depend on us living up to these agreements so they can live up to theirs. These fact-based discussions make it easier to talk about [competency, commitment, and capacity](#) (CCC). Consistently failing to live up to our agreements indicates a problem.

Next, address any additional questions that are worth discussing. We pre-set a few we recommend like overall strengths, opportunities for improvement, and growth goals, but feel free to add any relevant questions to your organization, or seats.

Finally, we recommend the focus shifts from how the team member is doing to how the leader is doing as both a leader and a coach. We maintain lists of key responsibilities for either discipline to assist this evaluation.

Core Disciplines of Great Quarterly Discussions

1. Think of Quarterly Discussions as conversations, not interviews or performance reviews. Both sides should share equally in the conversation. The 1-on-1 tool acts as a guide, similar to how meetings work.

2. Put real effort into answering the questions beforehand. Completing the form in advance is a chance to gather your thoughts and prepare. That leads to a truthful, specific, and positive conversation, no matter what side of the table you're on.

3. Be ready to provide specific examples. Feedforward is powerful when it has context. Having specific examples can open the door to hearing different perspectives and gives the team member concrete ideas for taking things to the next level.

Hopefully Helpful Hints

Do you have more than one direct report? Create their conversations all at once and save yourself some clicks. Multiple team members can be selected when you click *New Quarterly Discussion* in Ninety. Each can be assigned a different due date and role (for team members wearing multiple hats).

Remember, each discussion will ultimately be a 1-on-1, even if they're all created simultaneously. If you're in person and want to get offsite for the conversation, Ninety lets you create PDFs of the completed forms that anyone can easily print out.

Any topic can be turned into an Issue, To-Do, or Rock during these conversations. These conversations frequently generate action items, so Ninety makes it easy to take action.

Takeaway

Healthy Quarterly Discussions are essential for everyone, and the best team members will crave the truth. Ninety gives leaders and their followers a proven framework to create great relationships as long as both the leader and the team member put the time and effort into having great conversations that are truthful, specific, and positive.

What's next? Visit the [90u Library](#) or [try Ninety today](#).

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