

Performance Management Tool:

Facilitating Skip-Level Conversations

Retain top talent, drive engagement, and foster connection. Download the interactive manager guide [Impactful Skip-Level Conversations](#) (use the embedded version in this document for accessibility).

Understanding what “skip-level conversations” are

Enhance Connection! Senior leaders who take the time to engage with employees at one level below their direct reports send a powerful message: your contributions, feedback, and experiences matter. These connections not only build trust but also strengthen engagement and a sense of belonging. Here’s why step-down conversations are essential.

- Employees who have the opportunity to engage with senior leaders are 37% more likely to feel motivated and committed to their roles (Gallup, 2022).
- 82% of employees believe senior leaders should interact more frequently with employees to demonstrate transparency (Edelman Trust Barometer, 2023).
- Senior leaders who engage directly with employees are 25% more likely to identify critical operational challenges early (Harvard Business Review, 2021).

Understanding when to conduct skip-level conversations

Skip-level conversations should be done to drive these 3 core areas.

1. Employee Engagement

- Drive Recognition & Development!
- Build a rapport with employees across all levels. Celebrate successes and identify development needs.

2. Foster a Consistent Open Dialogue!

- Allow opportunities to check in to gauge the employee’s relationship with their direct leader. Solicit positive and developmental feedback to strengthen the leader’s presence.

3. Address Organizational Changes and Uncertainty

- Allow for opportunities to check in during major changes such as leadership transitions, restructuring, and/or strategy shift.

Understanding the leader feedback cycle and how to engage in skip-level conversations

1. PREPARE:

- Inform the employee’s direct manager of the intent to schedule a meeting, explaining the “why”. Remember, these aren’t done to gather information to weaponize, rather to support development.
 - Plan the conversation. Schedule the meeting (define the right time and place) and connect with the employee before scheduling, sharing your intent for the conversation and help them understand what to expect.
 - When implementing this new process with a team, gauge the level of trust that exists to foster effective conversations. If you’ve not engaged with these employees informally before, consider
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opportunities to build the relationship. Consider an “informal setting” which can put the employee at ease, such as a meeting over coffee at an off-site location.

2. **Facilitate:**

- Set the tone. Assess trust levels and create an environment where open dialogue can occur. Establish outcomes to address needs (development, networking, committees, projects, etc.).
 - Reiterate confidentiality and the intent of the discussion.
 - Ask open-ended questions, remain open, and stay positive for constructive feedback.

3. **Follow-Up:**

- Plan follow-up conversations to gauge progress. Recognize positive performance. Consider updating the employees’ EPMS to document stretch objectives.
 - Document key takeaways, establish a plan to address concerns, and celebrate positive feedback.
 - Follow-up and follow-through by regularly checking in with the employee, strengthening the ongoing relationship

Access Additional Learning Resources

1. Play this video: What are skip-level meetings? Link [What Are Skip-Level Meetings?](#)
2. Play this video: Skip Level: Do’s and Don’ts. Link [Skip Level Meeting Do's and Don'ts](#)
3. Play this video: Skip Level Meetings: Hacking Your org Chart-3 bold moves to uncover hidden gems and landmines: Link [Skip Level Meetings: Hacking Your Org Chart - 3 Bold Moves to Uncover Hidden Gems \(and Landmines\)](#)
4. Play this video: How do you create psychological safety at work: Link [HOW DO YOU CREATE PSYCHOLOGICAL SAFETY AT WORK? Interview with Amy Edmondson](#)

Utilize the skip-level conversation guide to plan your next meeting.

Opening	<ul style="list-style-type: none">· How are things going for you and your team right now?· What’s been the most rewarding part of your role recently?· Is there anything you’d like me to know that you haven’t had the chance to share before?
Understand the Day-to-Day	<ul style="list-style-type: none">· What do you enjoy most about your current role?· What challenges are you/your team currently facing?
Feedback for Leadership	<ul style="list-style-type: none">· How is your relationship with your manager?· What’s one thing your manager does really well that helps you succeed?· Are there areas where you think your manager could provide support or guidance?· How can your leader best deliver feedback to you?· How does your manager motivate and inspire your team to perform at its best?· Where can team priorities be better aligned?· What areas is your leader strong? Where could they be even stronger?
Team Dynamics	<ul style="list-style-type: none">· How would you describe the dynamics within your team?· Where can collaboration or communication be improved amongst the team?· What’s something your team does really well that others could learn from?

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Growth & Development	<ul style="list-style-type: none">· What skills or experiences are you hoping to gain within the next year?· What barriers are preventing you from achieving your professional goals?· What development opportunities have you capitalized on?
Closing	<ul style="list-style-type: none">· Is there anything else you'd like to share that I didn't ask about?· What's one thing I, as a senior leader, can do to support you and your team?· How can we continue to make this a great place for you to work?