

## Planning for and Conducting a Reset Interview



This tool is designed for managers developing and engaging others.



The guide helps you to plan for and conduct a reset interview with employees when changes take place to the nature of the work, work environment and/or expectations of the role.



Use this tool to uncover factors that drive an employee to adapt and align to changes, enhance engagement and develop a “reset plan” where appropriate.

Recent history has taught us that our work, home and community environments can change in an instant. When unexpected change take place and uncertainty is prevalent, there are opportunities to innovate, flex, collaborate and adapt to the changing landscape.

The “reset interview” is a one-on-one, structured conversation between the manager and employee that reflects on lessons learned from the recent period of change, checks in on the employee’s current level of engagement with the work, and uncovers challenges and opportunities for moving forward on the job. Embed reset questions in your regular one-on-one meetings or schedule as a discrete conversation to identify and minimize triggers that can cause an employee to become disengaged and/or dissatisfied with the role and consider leaving.

Learn about your talented employees’ goals and what they love (or don’t love) about their work.

Don’t stop with one chat.

Talk (and listen!) daily, weekly, monthly.

Develop a true relationship!

*Dr. Beverly Kaye  
Author, Speaker, Thought Leader*

### What are the Benefits of a Reset Interview?

- Build employee trust
- Learn best practices and new approaches
- Establish actionable plans to address challenges
- Drive greater employee engagement and morale
- Retain valued employees
- Support mental health and well-being
- Prevent surprise employee resignations

## Planning a Reset Interview

- Determine your intention for the interview, for example:
  - Are you trying to engage an employee who has struggled during a period of change?
  - Are you discussing return to work after an extended time of the employee working remotely?
  - Are you trying to learn about the impact of the transition and uncover different approaches going forward?
- Schedule the conversation so the employee knows you are dedicating time for the discussion and can be prepared.
  - Schedule the meeting for no more than 20-30 minutes or dedicate 10 minutes of your regular one-on-one meeting to ask one or more questions.
- Conduct the reset interview in a private setting so that the employee feels comfortable disclosing information.
- Incorporate ongoing follow-up conversation into your regular one-on-one meetings.

## Open the Reset Interview

To begin the conversation in a reset interview, you can say to your employee:

*I would like to talk with you about your experience with Penn Medicine throughout this global pandemic so I can learn what worked, what did not and how we can make this an even better place to work for you.*

*We have just come through a major period of change. You are a valuable member of our team. I want to be sure that I'm doing everything I can to keep you satisfied, engaged and productive.*

*What can we learn from this experience and apply moving forward?*

## Identify Questions to Ask

To identify the factors that drive employee engagement, retention and/or motivate them to consider leaving, you want to ask open-ended questions. Choose 1-2 questions from each of the relevant categories or select 1-2 questions to add to your regular one-on-one meetings.

### Lessons Learned/New Ideas

- What was your greatest lesson learned over the past year?
- What was your greatest accomplishment over the past year?
- What was most challenging for you over the past year?
- What helped you to continue being productive during this time?
- What did you do to effectively collaborate with others?
- What have you learned about your own agility and adaptability during this period of time?
- How did you stay connected and build relationships in a remote setting and/or while wearing masks?
- What are some new ideas or work practices that you would like to see us implement?
- What new supports would help you be even more effective in your role?
- What are some old approaches or work practices that we should rethink?
- Are there any new healthy or helpful habits you introduced into your life during this time? How can I help you maintain these?
- Have your priorities shifted over the past year? Does your current work align with this shift?
- What aspect of your role has been the most challenging to maintaining a healthy work/life balance?

### Role Satisfaction

- What do you look forward to when you come to work each day?
- What do you value most about working here?
- What keeps you working here?
- What makes a great day at work?
- How do you like to be recognized?

### Role Effectiveness

- What can I do to best support, reward or recognize you more effectively?
- What can I do more or less of as your manager?
- What would enable you to perform even more successfully and productively in your role?

### Role Derailers

- What would make your job even more engaging?
- What talents are not being used in your current role?
- If you had a magic wand, what would be the one thing you would change about your work, your role and/or your responsibilities?
- What might tempt you to leave?
- What about your job frustrates you or keeps you up at night?
- What type of feedback would you like to receive about your performance that you are not receiving now? From me or others?
- When you picture the upcoming week, what things do you dread?

## Close the Conversation with Next Steps

When closing the reset interview, summarize the key feedback the employee shared. Use this insight to develop next steps with clear goals including activities related to the following:

- New ideas and approaches to work
- Ways to overcome challenges that the employee is currently facing
- Suggestions for better work processes or environment so the employee can work more efficiently
- Address any other concerns that are raised

Examples of closing statements include:

*Let me summarize what I heard you say about working at Penn Medicine and the lessons learned over the past year, as well as opportunities to drive even greater engagement. Then, let's develop a plan to make this an even better place for you to work.*

*I appreciate you sharing your thoughts with me today. I am committed to doing what I can do to keep you satisfied, engaged and productive.*

## Additional resources that can help you plan for and conduct a reset interview:



- [A Healthy Way Forward and the Future of Office Work](#)
- [Nine Tips To Manage Reentry After The Pandemic \(forbes.com\)](#)

## Next steps to consider:



- Follow-up with your employee to track progress on the Reset Plan goals.
- Conduct regular follow-up conversations regarding your reset interviews to stay on track and adjust the Reset Plan accordingly.
- Talk to your HR Partner to identify opportunities to support the plan.
- Reach out to a PMA talent development specialist.



TALENT MANAGEMENT FRAMEWORK TOOLKIT AT PENN MEDICINE

### Reset Interview Guide

Use this worksheet to help plan for and conduct a Reset Interview with one of your employees.

<b>Employee Name</b>	<b>Date of Interview</b>
<b>Opening Statement</b>	
<b>Questions to Ask</b>	
<b>Closing Statement</b>	
<b>Next Steps</b>	
<b>Next Scheduled Reset Interview Date</b>	