

# The Billing Manager's Performance Conversations & Accountability Playbook

*How to challenge, coach and hold standards without creating dependency*

**The central question**

How do I turn performance data into better conversations, clearer expectations and changed behaviour?

Most billing managers do not have a data problem. They have a conversation problem: the dashboard shows a red ratio or a missed commitment, and the manager says nothing, says too much, or quietly fixes it. This playbook is the practical answer: how to diagnose, what standards to hold, what to say, and the weekly tools that keep it going.

**How to use it.**

Read Parts 1 to 3 once to set fair standards and choose the right response.
Use Part 4 the day before a difficult conversation.
Run Part 5 every week inside the Monday, Wednesday and Friday rhythm from Guide 1.

The conversations are illustrative.
Adapt language, support and escalation to the individual, the evidence, company policy and employment requirements.

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**Part 1: What Good Accountability Looks Like**
Clarity, standards and accountability without micromanagement.

**Part 2: Is This Skill, Will or System?**
Diagnosing performance issues and choosing the right intervention.

**Part 3: Setting Non-Negotiable Standards**
Clear expectations, consistent checks and consequences.

**Part 4: Performance Conversations**
10 practical scenarios covering underperformance, missed commitments, difficult conversations and manager dependency.

**Part 5: The Billing Manager Weekly Control Pack**
Eight practical templates for weekly reviews, coaching, accountability and intervention.

# Part 1 | What good accountability looks like

Accountability is a loop: a clear expectation, a check at an agreed point, and a predictable response. If any of the three is missing, you are hoping, not managing.

## Clarity is not micromanagement

| Clarity sounds like | Micromanagement sounds like |
|---|---|
| "What outcome have you committed to by Friday?" | "Show me what you are doing every hour." |
| "What evidence will show the plan is working?" | "Do it exactly the way I would." |
| "We will review the standard on Wednesday." | "I will keep checking until you finish." |
| "What support would help you deliver this?" | "Leave it, I will handle it." |

Test it. Ask three consultants what is expected of them today, this week and this month, then answer the same questions yourself. If the answers differ, the problem is not motivation. The picture is unclear.



# From Behaviour to Conversion to Outcome.




**Behaviour:** what the consultant did or did not do.
**Conversion:** what happened as a result in the pipeline.
**Outcome:** what this means for fees, starts or productivity.

If a manager jumps straight to the outcome, the coaching arrives too late. Start with the behaviour or decision that drove it.

***Avoid the activity trap.*** *If conversion is red, asking for more CVs only creates more rejection. Fix the cause before increasing the volume.*

## Earn the right to challenge

1. **Specific.** Would both of you describe the expectation in the same words?
2. **Taught.** Was the skill explained, demonstrated and practised where needed?
3. **Realistic.** Were workload, authority, tools and competing priorities workable?
4. **Checked.** Was a review point agreed, or did you expect them to remember?
5. **Consistent.** Would a similar miss from someone else get the same response?
6. **Not rescued.** Have you taken the task over before, teaching them it is optional?



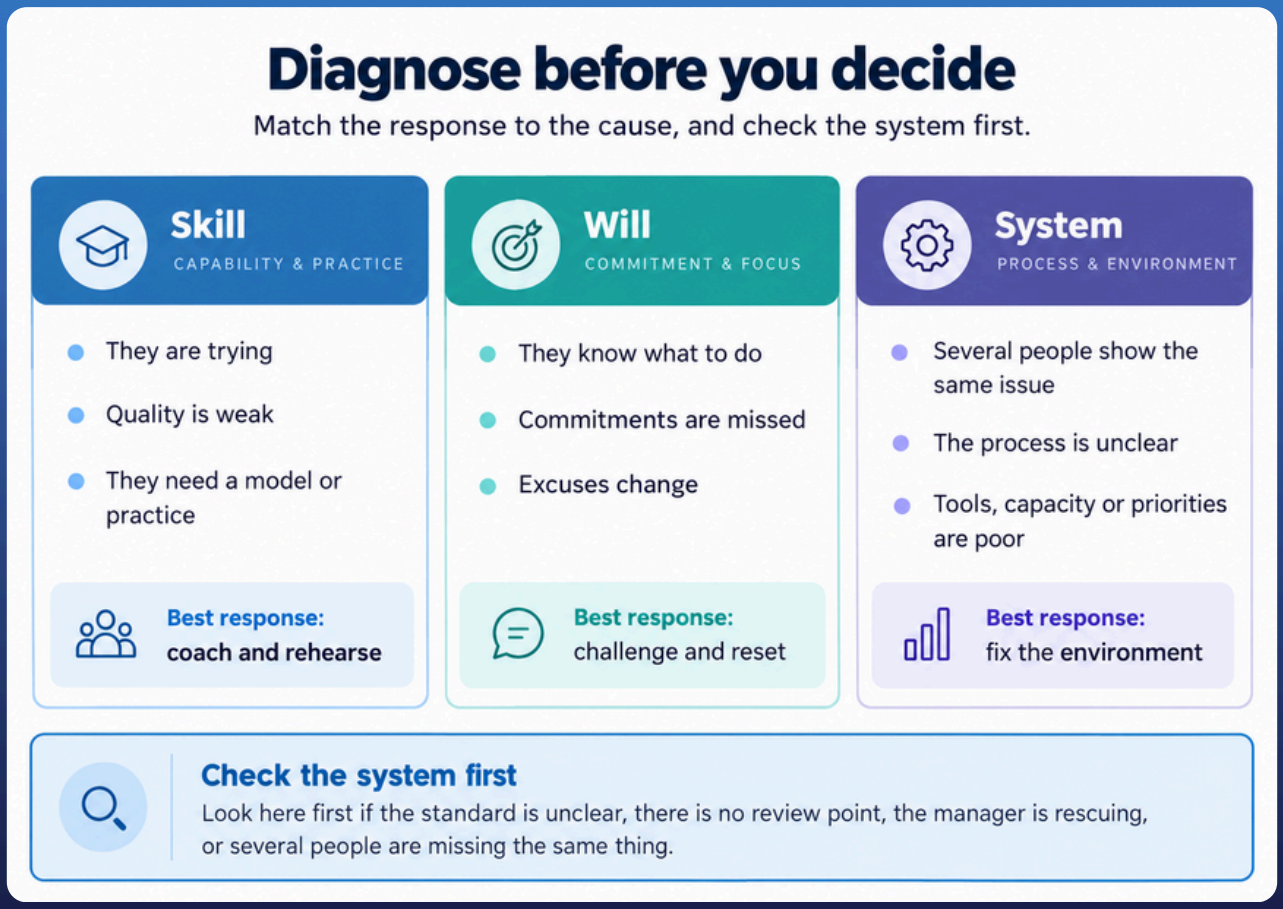
*"I am on your side, but I am not going to lower the standard to make this conversation easier."*

| Action | Owner | Deadline | Review point |
|---|---|---|---|
| What specifically will happen? | Who will do it? | By what date or time? | When and how will it be checked? |

A conversation can feel direct and still change nothing if the close is vague. "Improve follow up" is not a commitment. "Call the three waiting clients by 4pm, record each decision and bring any blocker to Wednesday's review" is. Without all four, accountability has not changed.

# Part 2 | Is this skill, will or system?

The wrong diagnosis creates the wrong response. Coaching a will problem wastes time. Challenging a skill problem damages confidence. Ignoring a system problem blames the visible person for a wider issue.




*Look at three recent examples, decide the most likely cause, then choose the response that matches the cause*

Skill and will describe the consultant. The bar underneath comes first: if the standard, the process or your own behaviour is part of the problem, no quadrant will fix it. When several people miss the same thing, suspect the system.

## Signs of each cause

| Skill gap | Will gap (follow-through) | System issue |
|---|---|---|
| Tries consistently, but the result is weak or messy | Agrees the plan, then repeatedly does something else | Several people miss the same requirement |
| The same mistake appears in different forms | Has done it well before and knows how | Ten competing priorities, no clear focus |
| Asks for help, or hesitates | Explanations change from week to week | Tools, access or timing make it hard |
| Ratio stays red despite visible effort | Performs only when the manager is watching | The expectation was never taught or checked |
| Test: watch them do it. A skill gap shows as struggle. | Test: Check for repeated missed commitments after ruling out skill gaps and practical barriers. Look for a pattern of poor follow-through despite clear expectations and appropriate support. | Test: ask which part of the process makes this hard. |

## The five-question diagnosis

1. What exactly was expected, and what happened instead?
2. Can this consultant show the skill on a real example?
3. What made delivery hard: priorities, client circumstances, access, tools or competing work?
4. Did they make, and understand, a clear commitment?
5. What is the smallest change we can test, and what evidence will show it worked?

If you cannot tell, observe before you decide. Sit in on a call or review three real submissions. Ten minutes of evidence beats an hour of debate about motivation.

# Matching the Response to the Cause

| Cause | Response and how it sounds | Evidence of progress |
|---|---|---|
| **Skill** | Demonstrate, practise, observe, review. "I can see the effort, but the last three submissions have not converted. Let's review how you qualified them and practise how you position fit." | A stronger next call, submission or client conversation |
| **Will** | Restate the standard, check for barriers, record the commitment, follow up every time. "We agreed a clear action and time and it has not happened. What got in the way, and when will it be done?" | Actions completed without repeated chasing |
| **System** | Clarify the standard, remove steps, reprioritise or fix tools. "Three of you are missing the same update window. Before we call it discipline, let's look at the workflow. What should we simplify?" | Several people meet the standard with less friction |
| **Mixed** | A short support and accountability plan. Review which barrier actually moved. | Behaviour and stage progression both improve |

## Intervention should match the cause

**Skill gap** ▸ more observation, demonstration, rehearsal and feedback.
**Will gap** ▸ firmer clarity, stronger ownership and follow-through.
**System issue** ▸ process change, tooling, workload reset or role clarification.

# Part 3 | Setting non-negotiable standards

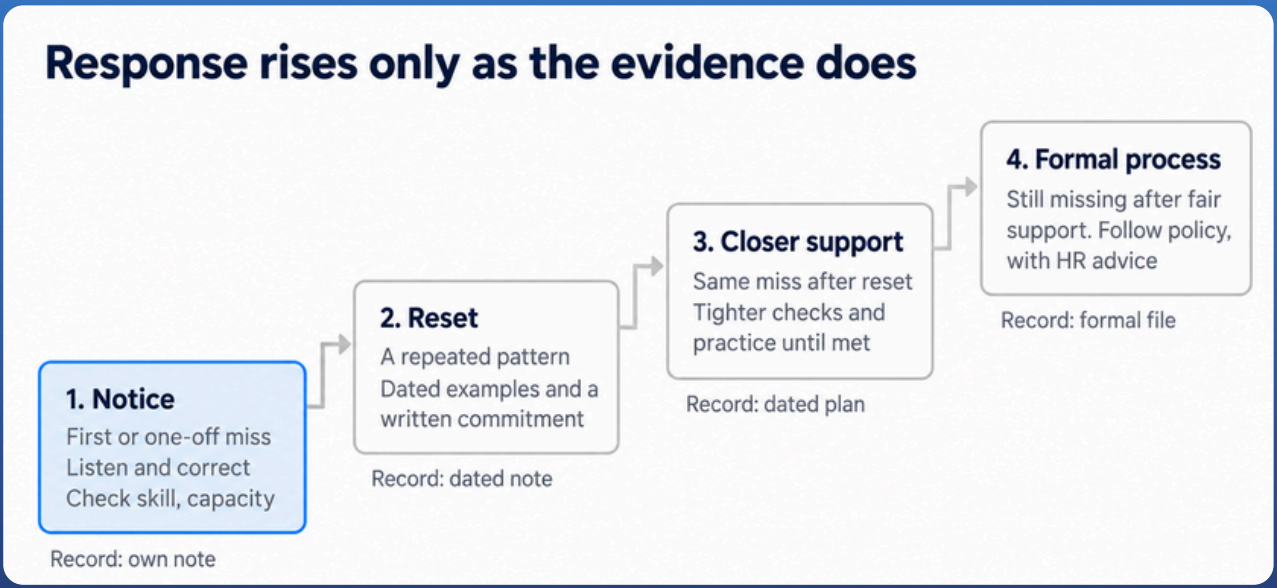
A standard is a behaviour you respond to every time it slips, however busy the desk or however well the person bills. Six are enough.
**Guides 1 and 2 define them; this guide is about how you hold them.**

| Standard | What good looks like | How you check it |
|---|---|---|
| **CRM discipline** | Material activity, decisions, risks and commitments recorded within 24 hours | Wednesday spot check of three live records |
| **Weekly commitments** | The main outcome is stated on Monday and evidenced on Friday | Monday commitments against Friday outcomes |
| **Role quality** | No heavy delivery before the essential brief and process commitments are secured | Weekly live role review (Guide 2) |
| **Speed and follow up** | Candidate replies and client feedback chased within agreed service levels | Overdue actions and named owners |
| **Candidate control** | Motivation, competing processes, notice and counter offer risk handled before offer stage | Sample real deals and ask what happened |
| **Job focus** | Time goes to fillable work; stalled roles are decided, not carried | Decisions made at the live role review |

## Set a standard in five steps

1. **Name it** in plain language.
2. **Explain** the commercial reason it matters.
3. **Show** what good looks like on a real example.
4. **Ask** the consultant how they will apply it.
5. **Agree** the first check and how gaps will be handled.

> *"Every live role needs a complete qualification note in the CRM within 24 hours, because unclear briefs create wasted searches and weak coaching. Good means we can see the must haves, deal breakers, salary, timeline, decision process, feedback commitment and what the client has already tried. Show me one complete example, then let's review your live roles on Wednesday."*




Agree the ladder once, share it with the whole team, then apply it the same way every time. Good consequences are proportionate, specific, time limited and removable: "until three consecutive weeks are met", not "until I feel better about it".

## No two-tier culture

A strong biller may fairly challenge a standard. Listen, and improve a poor rule if the evidence supports it. But results are not a reason to opt out of minimum CRM, candidate care or process standards. The test: if your best biller missed it, would you respond the same way?

***The manager's rule**. Call the team standard publicly. Coach or challenge individuals privately. Base the conversation on actions and evidence, never character, and follow through on what you agree.*

# Part 4 | The conversations managers must handle

Use the following conversation cards as working models.
Adapt the words to the person and the situation, but keep the structure.
Good conversations stay specific, evidence based and calm.

| If it is mostly about | Go to |
|---|---|
| **Skill or confidence** | 4.4 When a consultant asks for more candidates<br>4.7 When confidence has dropped |
| **Follow through** | 4.2 When someone is busy but nothing is moving<br>4.3 When a role has stalled<br>4.5 When CRM use is inconsistent<br>4.8 When a consultant repeatedly misses commitments |
| **Standards and ownership** | 4.6 When a strong biller resists management<br>4.9 When the manager needs to stop rescuing |
| **An explanation that hides the cause** | 4.1 The market is blamed |
| **Reinforcing what works** | 4.10 When someone has done it right, or when the team has had a weak month |



# 4.1 The market is being blamed

| | |
|---|---|
| **Situation** | A weak desk is being explained away by external conditions. The market may be tougher, but the explanation is too broad to coach. |
| **Manager trap** | Agreeing too quickly or arguing about the market in general. |
| **What you need to establish** | Whether the issue is really demand, candidate quality, role quality, preparation or pace. |
| **Questions to ask** | • Which part of your funnel is weakest right now?<br>• What do the last three live examples show?<br>• Where specifically are we losing momentum? |
| **Example conversation** | **Manager:** *"The market may be harder, but 'the market' is not a coaching point. Show me where the process is breaking. Are we short on good roles, weak on CV-to-interview, or losing control later?"*<br>**Consultant:** *"Interview-to-offer is where it is falling away."*<br>**Manager:** *"Good. Then that is where we coach. Let's review the last three interviews and the client calibration after each one."* |
| **How the conversation must end** | **Action:** review three recent interview processes.<br>**Owner:** consultant.<br>**Deadline:** before Friday.<br>**Review point:** Friday review. |



# 4.2 When someone is busy but nothing is moving

| | |
|---|---|
| **Situation** | The consultant is active and under pressure, but the desk is full of open loops and drifting work. |
| **Manager trap** | Rewarding busyness instead of judging progress. |
| **What you need to establish** | Whether the workload is real opportunity or disguised waste. |
| **Questions to ask** | • Which roles would you accept again today?<br>• What moved this week?<br>• Which items are taking time without a dated next step? |
| **Example conversation** | **Manager:** *"I can see you are busy. The issue is not effort. The issue is that very little has moved. Let's separate work now, qualify first and deprioritise. Which three roles deserve your best time this week?"* |
| **How the conversation must end** | **Action:** re-rank live roles into three categories.<br>**Owner:** consultant.<br>**Deadline:** today.<br>**Review point:** Wednesday realignment. |



# 4.3 When a role has stalled

| | |
|---|---|
| **Situation** | A vacancy has been open too long and there is no firm next step on the client side. |
| **Manager trap** | Allowing “waiting for feedback” to become a status. |
| **What you need to establish** | What is actually missing: access, urgency, specification, approval or candidate control. |
| **Questions to ask** | • Who owns the next client-side decision?<br>• What was agreed at intake?<br>• What is the cost of delay on this shortlist? |
| **Example conversation** | **Manager:** *“This role is not live just because it sits in the CRM. What exactly are we waiting for, who owns it and by when will it happen? If we cannot answer those three questions, we need to requalify the role.”* |
| **How the conversation must end** | **Action:** secure a dated client response or reclassify the role.<br>**Owner:** consultant.<br>**Deadline:** within 24 hours.<br>**Review point:** next morning. |



# 4.4 When a consultant asks for more candidates

| | |
|---|---|
| **Situation** | A consultant wants more sourcing activity when the real problem may sit elsewhere. |
| **Manager trap** | Approving more search volume before checking whether the current process is sound. |
| **What you need to establish** | Whether the issue is genuinely top-of-funnel or whether matching, briefing or control are weak. |
| **Questions to ask** | • How many credible candidates have already been spoken to?<br>• What happened to the last three submissions?<br>• Would more candidates solve the actual bottleneck? |
| **Example conversation** | **Manager:** *"More candidates might help, but only if candidate shortage is the real problem. Talk me through the last three people you sent. If they were good, why were they not interviewed? If they were not good, why not?"* |
| **How the conversation must end** | **Action:** diagnose the blockage before increasing search time.<br>**Owner:** manager and consultant together.<br>Deadline: now.<br>**Review point:** immediate decision. |



# 4.5 When CRM use is inconsistent

| | |
|---|---|
| **Situation** | Notes, next steps and evidence are missing or incomplete, making it hard to coach or hand over work. |
| **Manager trap** | Treating CRM discipline as admin rather than commercial hygiene. |
| **What you need to establish** | Whether the issue is capability, habit or a bad workflow. |
| **Questions to ask** | • What part of the update process is being skipped?<br>• What does the missing note stop us doing?<br>• What simple version of the standard can we keep every day? |
| **Example conversation** | **Manager:** *"This is not about tidiness. When the note is missing, we lose visibility, speed and ownership. Show me how you currently record the role. Let's simplify the process if needed, but the standard stays."* |
| **How the conversation must end** | **Action:** agree the minimum CRM standard and daily update window.<br>**Owner:** consultant.<br>**Deadline:** from today.<br>**Review point:** Friday sample check. |



# 4.6 When a strong biller resists management

| | |
|---|---|
| **Situation** | A high performer treats standards or review as unnecessary because their billings are strong. |
| **Manager trap** | Backing away because the person bills well, or making it personal. |
| **What you need to establish** | Whether the resistance is about autonomy, fairness, prior experience or genuine disagreement. |
| **Questions to ask** | • Which part of the standard do you disagree with?<br>• What do you think the team learns if we exempt top billers?<br>• How can we keep autonomy without lowering the standard? |
| **Example conversation** | **Manager:** *"This is not about controlling you. It is about making the desk scalable and fair. High billings buy trust, not exemption. I want you to keep your judgement and your style, but the standards still apply."* |
| **How the conversation must end** | **Action:** restate the non-negotiable standard and how it will be checked.<br>**Owner:** consultant.<br>Deadline: immediate.<br>**Review point:** next agreed checkpoint. |



# 4.7 When confidence has dropped

| | |
|---|---|
| **Situation** | A consultant has had setbacks and is becoming hesitant or overly reactive. |
| **Manager trap** | Mistaking low confidence for low care, or offering vague encouragement without direction. |
| **What you need to establish** | Whether the person needs skill support, smaller wins, or a reset in focus. |
| **Questions to ask** | • What feels hardest right now?<br>• Which recent step went well that we can repeat?<br>• What single action this week would rebuild control? |
| **Example conversation** | **Manager:** *"I am not lowering the standard, but I do want to shrink the problem. Let's pick one behaviour that gives you control back this week, practise it properly and review it early."* |
| **How the conversation must end** | **Action:** one smaller, high-value behaviour goal.<br>**Owner:** consultant.<br>**Deadline:** this week.<br>**Review point:** mid-week. |



# 4.8 When a consultant repeatedly misses commitments

| | |
|---|---|
| **Situation** | The same type of commitment is being missed more than once. |
| **Manager trap** | Having the same coaching conversation repeatedly without changing the level of accountability. |
| **What you need to establish** | What was agreed, how many times it has been missed and whether the issue is skill, will or system. |
| **Questions to ask** | • What did you commit to?<br>• What happened instead?<br>• What needs to change this time, and what evidence will show us that it has? |
| **Example conversation** | **Manager:** *"This is no longer about the original task. It is about trust in your commitments. We have discussed this before. What is going to change, and what extra check or consequence is needed so this does not repeat?"* |
| **How the conversation must end** | **Action:** revised commitment plus consequence if missed again.<br>**Owner:** consultant.<br>**Deadline:** agreed date.<br>**Review point:** fixed in diary now. |



# 4.9 When the manager needs to stop rescuing

| | |
|---|---|
| **Situation** | The manager keeps stepping in to save the result, answer the message or take over the client call. |
| **Manager trap** | Confusing helpfulness with leadership and creating dependency. |
| **What you need to establish** | What the consultant should own, what support is still appropriate and what the manager must stop doing. |
| **Questions to ask** | • What part of this should the consultant do, even if imperfectly?<br>• What support would build capability rather than replace it?<br>• If I step in, what lesson does that teach? |
| **Example conversation** | **Manager:** *"I will help you think it through, sit beside you or review the draft. I will not take the call for you. If I keep stepping in, the team stays dependent and the same issue returns."* |
| **How the conversation must end** | **Action:** define support without takeover.<br>**Owner:** manager and consultant.<br>**Deadline:** now.<br>**Review point:** after the attempt. |



# 4.10 When someone has done it right, or when the team has had a weak month

| | |
|---|---|
| **Situation** | Managers also need to reinforce good practice and reset the team after poor results. |
| **Manager trap** | Using review meetings only to discuss problems. |
| **What you need to establish** | What behaviour or judgement is worth repeating, and what the team needs to learn from the month. |
| **Questions to ask** | • What specifically went well, and how can we repeat it?<br>• What should become standard practice across the team?<br>• After a weak month, what needs to change rather than simply increasing activity? |
| **Example conversation** | **When someone has performed well:**<br>**Manager:** *"That was a strong result. What did you do differently that made it work? Let's identify what we can repeat and share with the wider team."*<br>**After a weak month:**<br>**Manager:** *"Let's look at what actually happened. Where did we lose momentum, and what could we have controlled better? Let's agree on one or two changes for next month."* |
| **How the conversation must end** | **Action:** Capture what worked or agree the key improvements needed.<br>**Owner:** Manager, with input from the team.<br>**Deadline:** Immediately after the review.<br>**Review point:** Next Monday's kick-off. |



# Part 5 | The Billing Manager Weekly Control Pack

The Monday, Wednesday and Friday check-ins form the core weekly rhythm from Guide 1.

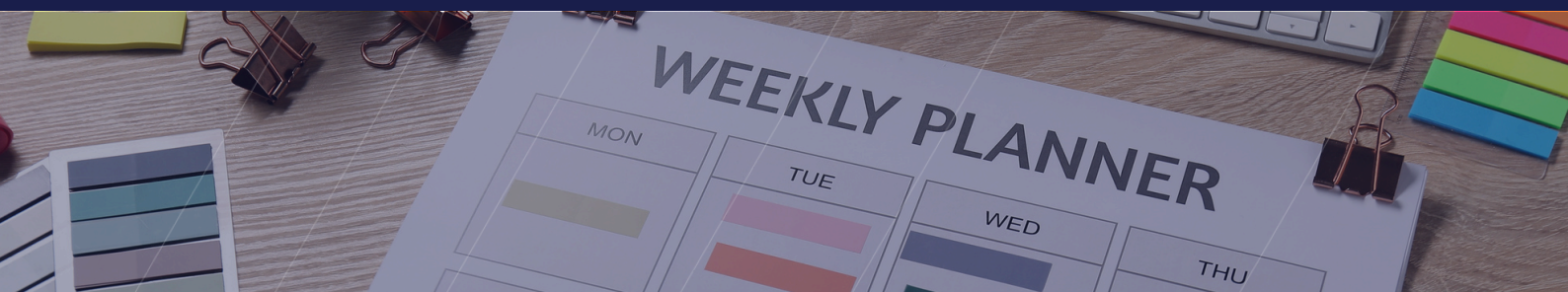
The additional tools fit within these existing conversations:

- **Monday:** Set outcomes and commitments.
- **Wednesday:** Review live roles, address risks and coach performance issues.
- **Friday:** Review progress, commitments and standards.
- **One-to-ones:** Use existing coaching time for deeper performance diagnosis when needed.

These are not extra meetings or another reporting system. Aim for 35 to 60 minutes per consultant per week across the core touchpoints, adapting where additional coaching is needed.

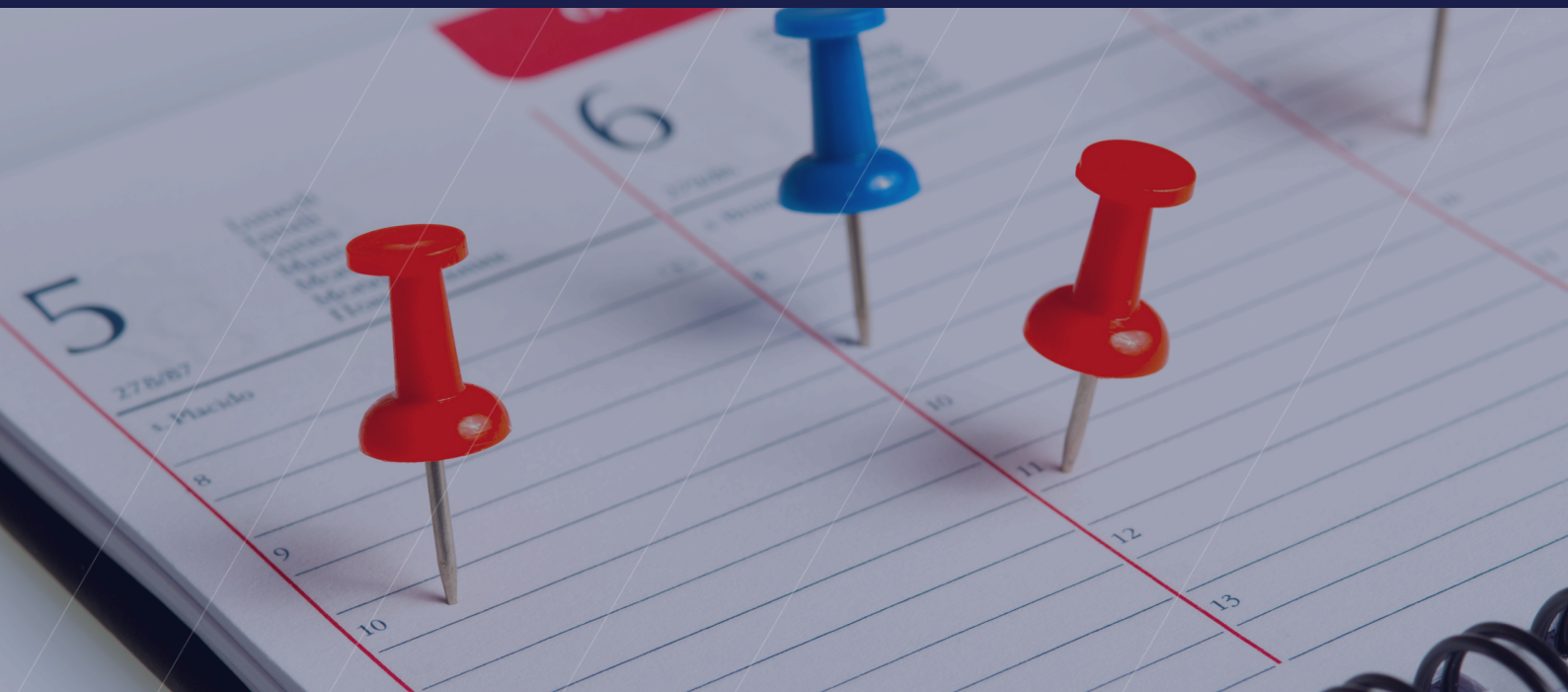
Use them consistently and difficult conversations become less dramatic because issues are seen earlier, with better evidence.



# One page operating sheet

| Moment | Questions | Decision |
|---|---|---|
| **Monday** | What is the outcome? How will it be achieved? Why this way? What could stop it? | Confirm the plan and the evidence expected by Wednesday |
| **Wednesday** | What changed? Where are we off track? What is the biggest risk? | Continue, refocus, escalate, requalify or stop |
| **One-to-one (existing coaching time)** | Which ratio most affects future billings? What pattern is causing it? | One behaviour change and a seven day measure |
| **Live role review (Wednesday)** | Would we take this role again? What is the next step? Where is the friction? | Push, reset, requalify or walk away |
| **Standards review (Friday, weekly or fortnightly)** | Is this skill, will or system? | Coach, clarify, challenge or apply the consequence |
| **Friday** | What was committed? What happened? What was learned? | Close the loop and set next week's priority |



## Tool 1 | Monday outcome conversation

Use at the start of the week to set direction. The aim is to agree what must move and where management attention is needed.

| Ask | Record |
|---|---|
| **What are your top three outcomes this week?** | |
| **Which roles or candidates matter most?** | |
| **What is the next dated step on each?** | |
| **What is most at risk of drifting?** | |
| **What support or escalation might be needed?** | |

**A weak answer is** *"I will do more BD."*
**A strong one is observable:** *"I will book two meetings with decision makers in the ten target accounts, using a call and follow-up sequence on Tuesday morning, because my pipeline depends too heavily on one account."*

## Tool 2 | Wednesday realignment

| Check | Record |
|---|---|
| **What has moved since Monday?** | |
| **What is now stuck, and why?** | |
| **What has changed in the role, candidate or client picture?** | |
| **What do we push, reset or deprioritise?** | |
| **What must happen before Friday?** | |

## Tool 3 | Friday review

Use at the end of the week to decide what was learned, not just what happened.

| Prompt | Record |
|---|---|
| **What progressed well, and why?** | |
| **What was missed, and what caused it?** | |
| **What pattern is emerging in the pipeline?** | |
| **Which standard or behaviour needs coaching next week?** | |
| **What will we repeat?** | |

## Tool 4 | Diagnostic one-to-one

Use when a measure, behaviour or pattern needs closer coaching.

1. **Open** with outcomes in a minute: what moved, what is at risk.
2. **Choose one measure** that will affect billings in the next two to six weeks, and rate it green, amber or red against your agreed ranges (Guide 1).
3. **Review three to five real examples** and ask the consultant to explain them.
4. **Diagnose** skill, missed commitment or process using Part 2. Observe or demonstrate if it is skill.
5. **Agree one specific change** for the next seven days.
6. **Set the evidence and the review date:** better quality or stage progression, not just more activity.

## Tool 5 | Live role review

Weekly, across ten live roles. Guide 2 has the full review.
This is the coaching prompt that keeps ownership with the consultant.

| Role | Current stage | Main friction | Decision: work now / qualify first / deprioritise | Owner / next step / date |
|---|---|---|---|---|
| | | | | |
| | | | | |

## Tool 6 | Standards review

Use weekly or fortnightly to check whether minimum expectations are holding.

| Standard | On track? | Evidence | If missed, what is the response? |
|---|---|---|---|
| **CRM discipline** | | | |
| **Role quality** | | | |
| **Commitment discipline** | | | |
| **Process pace** | | | |
| **Candidate control** | | | |
| **Job focus** | | | |

# Tool 7 | Skill, will or system diagnostic

Five to ten minutes of preparation before any performance conversation.

| Step | Question | Your note |
|---|---|---|
| **Facts** | What was committed and what happened? First, second or third time? | |
| **System** | Was it specific, taught, checked and applied equally? Have I rescued? | |
| **Skill** | Do they try but get weak results, or ask for help? Can they show it on a real example? | |
| **Will** | Have they done it well before? Do plans and actions keep diverging? | |
| **Conclusion** | Skill, will, system, mixed, or more evidence needed. | |
| **Response** | Coach and practise · restate and hold the commitment · clarify and reset (Part 2) | |



# Tool 8 | Intervention or rescue test

Use before you step into a consultant's problem.

Consider the level of risk, the consultant's capability and whether your involvement is genuinely needed. A serious commercial risk may justify intervention, even when coaching would normally be the better approach.

| Question | Intervene if | Rescue if |
|---|---|---|
| **What is the commercial value or risk?** | High, or a key relationship is at material risk | Modest, and you are acting because it is quicker |
| **Could they handle it with a question or short coaching?** | No, they lack the authority or experience | Yes, with guidance |
| **Does your authority or relationship change the outcome?** | Genuinely | You would just finish it faster |
| **How will they stay involved and learn?** | They join, roles are agreed first, you debrief after | They are out of the loop |
| **What stops this happening again?** | You can name a process change or coaching action | Nothing, so it will repeat |



***Practical rule.*** *Support the result while developing the person. Step in where risk or capability genuinely warrants it, use the lightest intervention that protects the outcome, and return ownership at the earliest safe point.*

# Better Conversations.
# Clearer Standards.
# Stronger Performance.

Great billing managers build stronger teams by creating clear expectations, encouraging ownership and helping consultants improve without taking over.

**That comes down to four disciplines:**

- Set clear standards. Make sure everyone knows what is expected and why it matters.
- Diagnose before reacting. Understand whether the issue is skill, will or system.
- Coach without rescuing. Provide support while keeping ownership with the consultant.
- Follow through. Every conversation should end with an action, owner, deadline and review point.

The goal isn't more difficult conversations. It's having the right conversations earlier, with better evidence and clearer outcomes.

**Your next step:** Identify one recurring performance issue, use the relevant conversation framework and review progress at your next weekly checkpoint.

**Great management isn't about doing more for your team. It's about helping them achieve more for themselves.**

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