

Managing Poor Performance Checklist

Nothing can be more frustrating than dealing with a poor performer! This checklist was designed to help you do a better job of improving performance, while eliminating unnecessary drama in the process. Consider the following *prior* to making any decisions.

- Remember to come from the *highest place* possible. How would you like to be treated? Even better, how would you like a loved one to be treated? How would somebody you greatly admire, or put your faith in, handle the situation? How can you manage this situation in a way that would make you proud and not stained with regret?
- Do you know *the facts*? Are they *documented*? It is important not to rely on perceptions or opinions when it comes to performance.
- You are responsible *to* other adults, not *for* other adults. The ultimate responsibility of management is to *place people in a position where they can succeed*. Whether they chose to do so is a decision for them to bear responsibility for. People usually succeed when they are doing things they *can* do well, *like* doing well and have the *experience* doing well. Is this the spot the employee finds themselves in?
- Dr. Deming (the father of Total Quality Management) stated that one of the biggest problems management faces is that it tends to recycle ignorance. *Are you clear* about the directives for your position/department/team? Are the instructions and expectations provided to employees well communicated? Or, have you *assumed* they know the company agency, what their job is, and that they could perform it *just like you*? Do they have a Performance Agreement and 90-Day Game Plan? Can you point to a place where specific language in a plan was not followed?
- Is the job reduced to a *Standard Operating Procedure* (SOP)? Is the system in writing and continually improved? Are there standard benchmarks for performance? (i.e. you are expected to clean 3 rooms spotless per hour). Can't you point to a place where the SOP was not followed?
- Have *priorities* been defined? (i.e. if time is short we would rather have one room done well than 3 rooms done sloppy). Have activities been *scheduled*? Is time being managed well? Did they work on one thing first when you thought they should be focused on something else?
- Are there any *policies, procedures, or agreements* which govern the performance expectations? Have other employees, under similar circumstances, been treated the same as this one?
- When an employee does something stupid, or that feels "unfair," watch your emotional state! *Take a deep breath*, say "Wow, that was interesting!" and keep your emotions in check. If necessary, go for a walk and come back. *Do not over-react and make a bad situation worse!*
- Once you have "chilled out," deal with it ASAP. *Ignoring, burying, or denying* poor performance will never make it go away. It only enables continued poor performance until it becomes cancerous.
- Be prepared*. Don't discuss employee performance with a "wing it" approach. Prepare your thoughts in writing. Use this checklist. If necessary, consider the *Pre-Termination Checklist*.
- Watch the *physical environment*. Ask, "Where would you like to talk about..." Go to a place that is "safe" for both you and the employee.
- Acknowledge *your fears*: i.e., inadequate instruction, confrontation, sabotage, villainization, no support from above, the union, not being seen as a "good person", and so on. Is the fear real? Isn't the risk of doing nothing even greater?

Managing Poor Performance Checklist

- Acknowledge ***their fears***: economic survival, professional reputation, lack of direction, loss of belonging, retaliation, and so on. Is the fear real? Isn't the risk of continued non-performance even greater?
- Focus on the conduct, not the person.*** Keep "You" out of the conversation. (i.e., "I noticed it is 20 after 9" vs. "You are late again!")
- Break the problem down.*** Is the non-performance the results of the person's skill, desire or experience? Are they being asked to do too much? Has the job passed them by? If it is skills or experience, will training or mentoring help? Do they need better orientation or instruction? Do you need to hire and promote better? Are valuable skills being ignored or undervalued? If skills or experience is not the problem have they lost their desire? If so, have you de-motivated them? Has somebody or something else done so? What "feels unfair" to them? Is it justified?
- Don't play psychologist or lawyer.*** Unless of course you are one. If you suspect there may be a disability affecting performance or third party interference (harassment, discrimination, sabotage), be quick to *involve HR*.
- Verbal Warning.*** "I noticed..." Then document specifically. You can speak of how you or others have effectively addressed the issue of concern. (i.e. "I once had a challenge with daycare too. I knew that if I came in late one more time I would be fired. Here is what I did.").
- Written Warning.*** Again, document specifically. Most importantly, get them to "own" their problems and keep those monkeys off your back! Consider use of the ***Employee Correction Form***.
- Consider ***suspension***. Will you do it with or without pay? And for how long? Again, have you treated other employees similarly? Have them use the leave to think about their responsibility under the circumstances. If they don't want to come back with the right attitude, then it's time to let them go.
- Create the ***Performance Improvement Plan***. First focus on the ***effort*** to correct their performance and then, later on, the ***results***. Once they have built confidence as a result of their efforts, it is easier discuss results.
- If they leave would you be relieved or upset?*** That's the test! If you would be relieved and they are still there...why? Can't replace them, poor documentation, you don't care anymore, don't want to be turned into a bad person? What is the added damaged to you, the organization, and to the employee if you keep them on? If you would be upset if they left, consider suspension, transfer, demotion and other alternatives.
- Get a second opinion.*** Nothing is wrong with getting your "head checked." Perhaps someone has a higher thought or a concern you failed to consider. Another manager or HR is a good place to start.
- Is the employee in a ***protected class***? Do they have a basis for arguing that they are being discriminated against due to their age, race, sex, disability, medical condition, and so on? Can they possibly claim that negative performance reviews are a form of retaliation?
- Manage with dignity.*** Keep it private and have somebody join you in the conversation only if necessary. Shouldn't be much to talk about so don't go for an employees attempt at a "last chance" to change your mind.
- Give yourself a break!*** Nobody said this isn't stressful. If necessary, give yourself an hour to take a pleasant walk or to catch up with a business contact. When you are ready, examine what you could have differently or better in managing this employee to avoid similar failures in the future.
- Remember, you can always contact the ***HR That Works Hotline*** if you ever need help!