

# HOW TO ADDRESS A DIRECT REPORT WHO IS UNDER-PERFORMING



**Most people come to work to do a good job but occasionally, for whatever, reason, people in your team might not be performing at their best.**

Getting underneath what's going on with empathy is important to help them, you and the business moving forward. In these scenarios, it's important to keep the conversation factual, be really clear about what you are seeing and don't jump to conclusions. Getting to the heart of the issue is important as ideally, you want to deal with the 'cause' behind the 'symptom.'

- **Say:** Hi [insert name], we need to have a chat about your performance at work. How do you think things are going?
  
- 👂 *Listen: Inviting them to share what's going on gives them time to reflect - they might be aware they've been struggling. Hear the team member out - there may be legitimate reasons for their performance dip. In this situation, arrange some time to deal with the issue they raise, is it training, processes, tools that they need or don't know how to use? There may be something going on in their personal life that's causing them to be distracted, in which case, they might need some time or flexibility to deal with what's going on for them.*
  
- **Say:** You may not be aware but I've noticed that [insert the specific task, general performance issue - be specific and factual e.g. 'you seem fine dealing with customers over the phone and face to face but your letters to customers are a bit blunt and to the point when we're giving them bad news']

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**?** **Ask:** Are you familiar with what I'm talking about, and would it be helpful for me to give you a couple of examples? [Provide some examples e.g. the letters, and be as specific as possible about what's not working in the letters - which bits are good and which bits need work, how to better position bad news, how to offer alternative solutions, how to soften a hard message, tone/language]

**?** **Ask:** Is there any reason(s) that are causing this to happen?

**👂** *Listen: Hear the team member out – there may be legitimate reasons for their issue e.g. written communication. Depending on the situation, organise some time to coach or guide them on the topics. If they don't have a legitimate reason*

**🗨️** **Say:** I appreciate that you're probably not always aware of it, but the impact of your performance at the moment is... [explain impact to them how it impacts them personally, impact to the team and to the business and customers e.g. looks like they don't care, doesn't meet the high standards of the team, gives an inconsistent experience to customers, can negatively impact how our customers view us, can damage our brand]

**🗨️** **Say:** I'm happy to support you and work on the things we discussed above, however, I really need you to take accountability for improving your performance. Moving forward, it's very important that you make improvements in [be specific about what good looks like e.g. show them a strong customer letter that has been sent, reviewing and checking draft letters with a colleague].

**?** **Ask:** Are you clear on what needs to happen moving forward? [Seek agreement and explain what next steps on coaching/guidance will be. Agree a time period for the improvement that's appropriate to the task e.g. couple of weeks, 1 month. Ask them to replay with what you've agreed back to you to ensure their understanding. Ask what they need from you to support them and adapt your style to where they are at e.g. if they are new to the job they might need more time, guidance and direction from you.].

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**How to respond to pushback:** People can take this type of conversation personally so you may be met with different emotions - anger, denial, shock. If this happens

**Ask:** Why don't you think this is an issue?

**Say:** I can see that you don't agree that this an issue but I need you to work on this and make this improvement. I need to see [outline the level of performance needed as you've covered already] by [insert date] Let's monitor things over the next month and I hope to see a real difference by then.

**How to wrap up the convo:** Summarise what you've discussed and agreed and invite them to say back to you what that is so that you're both aligned.

## **Next steps to consider:**

Make a note of the conversation as you might need this in case things don't improve. Review what additional support is needed, from you or from specialists, or anything else that needs to be changed in the team that could be adding to the issue. Set up regular check-ins to see how they are doing (don't just wait til the end of the agreed period) so that you can deal with any issues that crop up early on. Recognise the improvements you see to encourage them to continue to improve and close down the issue positively when the performance improvement has been achieved.

**For extra information on under-performance please contact your company HR or refer to government advice and legislation.**

