



How to structure a performance improvement meeting

As outlined in the Managing Performance Procedures and Guidance document, the manager should move to investigate the possible cause or causes of the employee's unsatisfactory performance. This should be done at a meeting with the employee, which will have the additional aim of identifying and agreeing actions to achieve improvement.

Because the meeting is investigatory, and not disciplinary, there is technically no statutory right for the employee to be accompanied. Nevertheless, the manager may wish to allow this if the employee would like support and requests it.

The steps to follow at a performance management meeting:

1. Set up a meeting with the employee to discuss the possible cause or causes of the substandard job performance, making sure that they know that the meeting is investigatory in nature, and not part of the disciplinary procedure.
2. At the meeting, clearly state the nature of the problem and explain why it is a problem, for example the consequences for the service when the employee makes mistakes or misses deadlines.
3. Give the employee specific examples of instances where their performance has fallen below the required standard or where tasks have not been completed on time or satisfactorily.
4. Remind the employee this is a supportive process and that this meeting is to help them improve.
5. Ask the employee what they enjoy about their job. This may help to make the discussion easier and reduce any defensiveness on the employee's part.
6. Seek the employee's agreement that there is a problem with certain aspects of their performance.
7. Ask the employee what they think the root cause of the problem is.
8. Consider any mitigating factors put forward, for example problems in the employee's personal life.
9. Restate what is expected in terms of job duties, priorities and outcomes. Avoid assuming that the employee knows everything that is expected of them.
10. Ask the employee's opinion on what he or she can do to achieve improvement in performance.
11. Seek to agree specific action points with the employee, the details of which will depend on whether or not any specific cause of unsatisfactory performance has been identified.
12. Agree a timescale for the improvement to be achieved.
13. Arrange training and/or coaching where appropriate.
14. Schedule a follow-up meeting to review the employee's performance and make sure that the meeting takes place.
15. Keep a record of the meeting and what has been agreed. Complete a Performance Improvement Plan template (Appendix 2)

What communication skills to use

Conducting a meeting with an employee to discuss unsatisfactory performance is never an easy task and it is understandable that a manager may have doubts and worries over such a meeting. Open, honest and unambiguous communication will be essential if such a meeting is to succeed.

In terms of communication skills, the manager should:

- stick to facts and avoid expressing personal opinions;
- be specific, avoiding vague, woolly statements;
- avoid generalisations, for example "you're always late";
- ask open questions;
- listen actively to what the employee has to say and take it on board;
- ensure that the tone used is friendly and not accusatory;
- use positive words such as "improvement" and "achievement", rather than negative words such as "failure" or "weakness";
- focus the discussion on future improvement rather than on past inadequacies;
- always check for understanding, for example by asking the employee to state or summarise his or her understanding of what has been discussed.

What to say and what not to say

Don't say	Do say
You're always making mistakes	There are three mistakes in this piece of work
You tend to shout at people	I noticed at last week's meeting that you shouted somewhat aggressively at Jim when he....
You're hopeless – you never meet your deadlines.	You've missed the monthly deadline six times this year so far, on each occasion by at least two days.
You're very aggressive	I appreciate that you may not realise this, but sometimes your tone and manner come across to others as aggressive. For example ...
Your work is not up to scratch. You'll have to pull your socks up.	This piece of work falls short of the standard we require because ...
You have a lousy attitude towards the rest of the staff.	What do you think you could do to improve your working relationship with your colleagues?
You're lazy. I can't ever rely on you to complete a piece of work	It has been brought to my attention that you have not completed ...

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