

## Your aim: Manage and support a team member who has a performance objective that is off track

### Part 1: Set the scene

Skills to practice: build rapport; build confidence to communicate difficult messages with care.

#### Background

Mid-year reviews are expected to be held between leaders and team members to discuss progress against Performance 6 objectives, and this has prompted you to set up this meeting. You will take the lead in the discussion.

This mid-year review discussion follows your regular check-ins and is a formal opportunity to discuss with your team member what they have achieved and how they have achieved this. You have let your team member know they are expected to reflect on their performance before the meeting, and that they should also come prepared to discuss what is working well (e.g., ways of working together), and what could be even better. As part of this discussion, it is important you are both aligned on how performance is progressing and what success looks like for the remainder of the year. Consider how you will be curious during your mid-year review discussion and show care and courage (e.g., by addressing any misalignment on performance progress).

*Before meeting with your team member, align with other leaders on what good performance looks like to ensure a balanced perspective during the review.*

#### Kai's situation at mid-year

Kai has been making good progress against most of their Performance 6 objectives, however at the mid-year mark, they have not made significant progress against one performance objective which focuses on [e.g., safety, productivity, ESG] continuous improvement.

- Kai is currently unlikely to achieve their continuous improvement performance objective by year end. Unless improvement is demonstrated, Kai is tracking towards receiving a reduced STIP outcome (e.g., 75%).
- As part of your regular check-ins with Kai, you have together planned actions Kai can take to progress this performance objective. Despite these discussions, Kai's efforts are not having the expected impact, and progress is falling behind the agreed timeframes.
- Kai is aware of the constraints facing the [e.g., team, site, Product Group] and that this performance objective will have a direct impact on the team's collective success.
- *Optional:* despite usually displaying the right behaviours, recently Kai does not appear to be consistently working in line with our values. You have previously discussed with Kai that how we achieve is equally important to what we achieve.

You want to understand what is holding Kai back from achieving this performance objective, motivate Kai to get their performance back on track and to consistently display our values. You also want to make sure Kai does not lose focus on their other objectives and ensure progress is continued to be made against these.

### Part 2: Team member feedback

Skills to practice: clearly communicating performance, dealing with challenge, managing emotional response to challenge (your own and others)

- **Critical:** Ensure Kai understands their performance is off track (What & How) and unless this improves, they are tracking towards receiving a reduced STIP outcome (e.g., 75%). It is important Kai knows exactly where they currently stand and why.
- Give Kai a moment to reflect on your feedback and share their thoughts. Acknowledge how they might be feeling.
- Be prepared to refer to previous discussions you've had with Kai on this performance objective (e.g., feedback shared, expectations previously provided, actions discussed etc) and your observations since these discussions.
- Be curious about what could be holding Kai back from making progress. Explore with Kai ways to support them to achieve.

### Part 3: Looking forward

Skills to practice: clearly communicating expectations, confirming your team member's understanding, influencing outcomes, closing with a positive outcome

- **Critical:** Ensure you are both aligned on Kai's performance being off track (What & How) and unless this improves, they are tracking towards receiving a reduced STIP outcome (e.g., 75%).
- Clearly communicate what changes/progress Kai needs to be make and by when. Check that Kai is clear on what is expected of them.
- Ensure Kai understands the importance of getting their performance back on track and to continue progressing their other performance objectives.
- Recap the main points of the conversation, the agreed actions to move forward, and agreed timeframes.
- Reiterate the importance of Kai making impactful changes to achieve outcomes in line with our values.
- Close on a positive note.

## Question tips

You might find these questions helpful in guiding your conversation. Of course, feel free to find your own approach – this is not a definitive list.

### Maintain Momentum

- How can I best support you?
- It sounds like you're frustrated. What can I do to remove this frustration?
- What motivates and encourages you?
- What success have you seen so far that we can build on?

### Share Feedback

- How do you feel about this?
- With hindsight, what could you have done differently?
- What do we need to do differently?
- How do you think your approach is influencing the outcome?
- Where do you feel you've made the most progress, and where do you see room for improvement?

### Seek to understand

- What gets in the way?
- Can we discuss in a bit more detail?
- What do you want for yourself?

### Seek out new challenges

- What other tasks or responsibilities can you take on to continue to grow your skills or improve your performance?
- What does success look like for you?
- What skills or knowledge do you think you need to meet these challenges?

### Identify support

- What is working well, and what could be even better?
- What would you like to see more of / less of from me?
- What support do we need to put into place? How can I support you with this?
- What gets in the way?

### Action plan

- What steps can we take to ensure you achieve these objectives?
- What might get in the way of you achieving your objectives?
- What would be five incremental steps you can take towards this target?
- Does your 'one thing to stop' help this?