

Your aim: Manage and support a team member who is significantly underperforming

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.

Lee's situation at mid-year

Lee is significantly underperforming against their role requirements and/or Performance 6 objectives (performance and/or development) and/or alignment to our values. In addition, Lee has been struggling with their 'one thing to stop' which is starting to impact their own and other's performance. Additional points:

- As part of your regular check-ins with Lee, you have together planned actions Lee can take to progress their Performance 6 objectives. Despite these ongoing discussions, Lee has not taken necessary action and/or the expected impact has not been achieved.
- Lee will significantly miss or not achieve their Performance 6 objectives by year end. Unless significant improvement is demonstrated, Lee is tracking towards receiving a reduced STIP outcome (e.g., 0% or 75%).
- You have previously discussed with Lee how they are impacting team [e.g., development, productivity, outcomes, engagement etc] by Lee not meeting their 'one thing to stop' and have previously coached Lee on actions they could take.
- *Optional:* Lee has displayed behaviours not aligned with our values which have impacted business outcomes and/or colleagues.
- *Optional:* Lee is currently on a Performance Improvement Plan and you have been working with HR to manage this OR Lee has previously been informed that one may need to be implemented if performance and/or behaviours are not improved.
- *Optional:* you have received feedback from key stakeholders and peers regarding Lee's performance and/or poor behaviours, and the impact this is having on business outcomes and/or colleagues.

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 Lee understands they are underperforming (What & How), and unless significant improvement is demonstrated, Lee is tracking towards receiving a reduced STIP outcome (e.g., 0% or 75%). It is important Lee knows exactly where they currently stand and why.
- Give Lee 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 Lee on their role requirements and/or Performance 6 objectives and/or behaviours (e.g., feedback shared, expectations previously provided, actions discussed etc) and your observations since these discussions.
- Be curious about what could be influencing Lee's performance and/or driving their behaviours. Explore with Lee ways to support them to improve.

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 Lee's underperformance (What & How) and unless significant improvement is demonstrated, Lee is tracking towards receiving a reduced STIP outcome (e.g., 0% or 75%).
- Clearly communicate what changes/improvements Lee needs to be make and by when. Check that Lee is clear on what is expected of them.
- Ensure Lee understands the importance of improving their performance and/or behaviours throughout the remainder of the year, and potential consequence/impact if this is not demonstrated.
- Recap the main points of the conversation, the agreed actions to move forward, and agreed timeframes.
- Reiterate the importance of Lee 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?