



ADDRESSING POOR PERFORMANCE POLICIES AND PROCEDURES 2024- 2025

HAHA Training Ltd
12 London Rd, North End, Portsmouth, PO2 0LH

Poor Performance Review:

<p>Meeting date:</p> <p>Employee name:</p> <p>Manager name:</p>
--

<p>1. What's the problem?</p>
<p>2. What's the evidence?</p>
<p>3. Employee response</p>

4. What improvement is needed?
5. Course of action
6. Date for review
7. Summary and check understanding

Signature of Employee.....

Signature of Manager.....

Notes for completing the template

What's the problem?

In **Section 1** note down what the specific area of an individual's performance that gives you cause for concern. For example, the issue might be persistent lateness, a decrease in accuracy or work quality, missed deadlines or rudeness to customers or colleagues.

What's the evidence?

When you meet with your employee you need to be able to present the problem clearly. Collecting evidence is a vital part of addressing performance as it helps you explain the problem, explain what is and isn't acceptable, and counter any opposition you may receive.

Use **Section 2** to outline the relevant evidence and how you will present it to the employee. Remember that the type of evidence will depend on the issue you are trying to address:

Poor performance often becomes apparent through errors and can usually be proven with documentary or physical evidence, including:

- paperwork or records illustrating what the employee did wrong or failed to do
- productivity or accuracy targets or standards that the employee is expected to meet
- performance agreements made with the employee
- records relating to the error, such as customer complaints or additional costs
- details of dates, times, places and other people involved

Misconduct such as bullying or theft can be more problematic to prove but supporting evidence might include:

- documentary evidence, such as falsified timesheets, expense forms or target achievement records
- testimony of witnesses' observations (remember that such observations are personal and therefore may be subjective so you should back them up with documentary evidence wherever possible)

Evidence relating to **attendance problems** is more easily collected. For example, records may show a pattern of unauthorised absence (e.g. sick days that always precede or follow other scheduled time off such as weekends or holidays). Note the employee's absences, including sickness and holidays, so that you are precise about dates and times.

As you outline details of the problem with your employee, tell them why you are concerned and what impact the problem is having on your other team members, department or customers.

The employee's response:

Ask the individual for their response, using **Section 3** to note the details. You should ask **open questions** to explore the reasons for the problem. At this point the employee may reveal something you are not expecting or are unprepared for, such as significant personal issues or circumstances which have compounded the problem. Remember that you can adjourn the meeting if you need more time to think through the next steps or conduct further investigations.

What improvement is needed?

In **Section 4** make notes about what standard(s) of improvement you expect. Consider what the employee needs to do differently in order to improve. Vague generalisations about 'improved performance' will not help the employee change their behaviour, so **be precise**.

Bear in mind that your employee might not know what the required standards are, so explain them explicitly. For example: "I expect you to be here at 9:00am every day", "your sales figures need to increase by 5%", or "you need to complete your timesheets accurately".

At this point it can be helpful to check the employee's understanding of the required improvement standards by asking them to summarise to you what improvements are expected and the action(s) or behaviour(s) that need to change.

Agree a course of action:

Use **Section 5** to outline a suggested plan for how the employee can improve. This might involve setting some short-**term performance objectives**, providing additional **coaching** or **training**, or developing a longer term **programme of activities**. The plan should detail what is ultimately required, who is responsible for each action and expectations for completion.

As you develop an action plan it is important to emphasise the employee's personal responsibility for improving their performance. However, you should encourage them to seek support and guidance from you throughout the improvement process.

Set a date for review:

For some performance issues (e.g. timekeeping or unauthorised absence) it is reasonable to expect an immediate improvement. However, for issues such as

work accuracy, productivity, communication and other interpersonal behaviours, improvement can be expected over a period of time. Use **Section 6** to set an appropriate date for a meeting at which you can **review progress**, make any relevant changes to the action plan and discuss next steps.

Summarise and check understanding:

As you bring the meeting to a close, ask the employee if they have anything further to add to the discussion and **summarise the main points**. You should also check the employee's understanding of the key points and ensure they know what improvements are expected.