

Conducting a Challenging Performance Review Meeting

You usually look forward to spending time with your team members, reviewing how things have gone and planning for the forthcoming period. The atmosphere is usually upbeat and constructive and you both leave the meeting feeling positive. However, there is one meeting coming up with a member of staff and you expect the performance issues are going to be quite challenging. How can you address these issues honestly and still keep the atmosphere positive?



Preparation is essential

In addition to the normal preparation involved, there are a number of things you need to consider that will help you prepare for and chair an effective review.

Ensuring a sense of perspective and balance is absolutely critical, otherwise your team member will almost certainly either become defensive or upset.

There are a number of things you can do to achieve this:

- List your concerns, then prioritise them.
- Select a manageable number of priority concerns relating to the shortfall in performance that you need to address in this meeting.
- For every concern selected, ask yourself if there is a flipside to this problem. For instance, 'They have never met a deadline yet but they are very thorough and accurate'. This will help ensure you have things in perspective and you do not lose sight of their strengths.
- Decide how to structure the feedback. For instance, are there positive examples you can feed back to help balance the criticism?
- Carefully structure and word your feedback.

Remember, there should never be any surprises.

Set the scene

At the beginning of a performance review, you would normally find ways to make your team member feel at ease. This is still absolutely relevant, but you need to find a way of achieving this without your behaviour appearing to be contradictory. For instance:

- You may feel it is more appropriate to introduce the meeting with an explanation of the format as opposed to an overly friendly few minutes catching up socially.
- It may be that it would be inappropriate, misleading or appear insincere for you to comment positively on their overall performance. Instead, it may be better to come to the point and be frank, but in a way that is constructive. For example, "This has been a difficult year with a number of challenges. We have had a number of discussions looking at individual pieces of work over the last few months. Today will give us an opportunity to look at your whole job, your performance, and explore the challenges with a view to identifying solutions for achieving these targets and how we can work together effectively."

Self-appraisal?

This can usually be quite an effective lead into difficult subjects. However, sometimes you need to be more directive if, for example, the member of staff is in denial or is particularly defensive. You will be the best judge of which approach you think will work best.

Reviewing the performance agreement/personal objectives

You need to be very clear about the feedback you give. It has to be frank and honest, but in a way that is constructive. After your meeting, this needs to be documented very carefully. It is strongly recommended that you ask a peer, manager or HR professional to proofread your draft to help you achieve this difficult balance. If it reaches the stage where you have to pursue the disciplinary procedure, it is not helpful to find that the appraisee's last couple of performance reviews give a glowing picture of how things have gone in the past if this is, in fact, not the case.

Looking forward

It is essential that clear targets are set with the standards and success indicators outlined in detail. Often, it is not just what you do, but how you do it that distinguishes a good performer from a poor performer. If this is the case, then consider establishing one or two behavioural objectives, describing the competencies required, to drive home the importance of the standards required.

Examples:

If an individual's interpersonal skills are causing friction in the team, you could set an objective such as 'building and maintaining working relationships at all levels and across service areas'.

If an individual's ability to manage their emotions needs to improve, an objective such as 'maintain a disciplined and professional level of performance under situational

pressure' might provide the focus required for this improvement.

Your organisation might have tailored competencies that you can refer to. If not, you might want to establish values and/or behaviours with your team.

The popularity of such competency-based reviews has rocketed in recent years due to their perceived fairness, as they consider the person as a whole rather than just what they achieve.

Concluding the meeting

- Confirm the areas of improvement that have been agreed, and how these will be taken forward.
- Agree a timescale for a review. They are likely to need closer supervision and more reviews when performance issues are challenging. Set a follow-up meeting and diary it at the end of the review meeting to help ensure progress.
- Summarise any housekeeping details such as how you will record the main discussion points and when.

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