

Performance Management Discussion Guidelines

Manager/Supervisor Discussion Guidelines

Perhaps the most significant benefit of a performance management plan is that, in the rush and bustle of daily working life, it offers a rare chance for a supervisor and their direct reports to have time for a one-on-one discussion of important work issues and developmental goals that might not otherwise be addressed.

Almost universally, where performance management plans are conducted properly, both supervisors and employees have reported the experience as beneficial and positive.

The performance management plan discussion offers a valuable opportunity to focus on work activities and goals and to consider what is going well and what can be done better. This is an opportunity to have a constructive two way discussion about the future by setting goals and planning an employee's development.

For many employees, an "official" performance management plan meeting may be the only time they get to have exclusive, uninterrupted access to their supervisor. The value of this purposeful interaction between a supervisor and his/her employee should not be underestimated.

The Performance Management Plan Process

1. Preparing for the Discussion

- Arrange with the employee a time and place that is convenient for both of you. Do this several days in advance, at a minimum. Confirm the time and place in writing.
- Provide the employee with the appropriate performance management plan for the employee's position. Prior to the meeting, ask the employee to write down any information that they feel may be pertinent to a discussion of the areas on the form
- Review the employee's job description and any written records or materials relevant to the employee's past performance, including recommendations/goals from the last performance management plan (appraisal) meeting. If the employee's job description and/or position questionnaire is not up-to-date consult with human resources.
- Prepare an overview of the areas you plan to cover with the employee and reflect on the intended outcomes of your discussion with your employee.

2. Leading the Discussion

- Select a place that is private and quiet, where you will not be interrupted.
- Establish an open, friendly, non-threatening atmosphere in which both parties can express themselves freely.
- Be aware of any feelings, attitudes, or issues of your own that may be influencing

your reactions to the employee and, be tuned-in to possible reactions from the employee.

- State why the discussion is taking place (even though you both already know). Explain how the discussion will be handled and what role each of you will play.
- Emphasize the importance of two-way communication and listen intelligently, understandingly, and skillfully to the employee's point of view throughout the meeting.
- Constructive feedback discussion – ask the employee to provide feedback . This is an opportunity for both supervisor and employee to develop strategies that contribute to a positive outcome(s), a better work process, improved performance or behavior. Be specific and relate your feedback to the role.
- Examine the points and information that have been identified during the discussion. Try to agree on what performance, if any, should be done differently. It may not be possible to reach total agreement on all points, but it is important that you both reach an understanding of the other person's views.
- The supervisor may schedule a mid-term progress meeting, and/or the employee may request an update meeting in the future..

3. Developing Recommendations

Together with the employee, identify any performance changes required as well as learning and development opportunities for the next performance planning period. The following areas should be considered:

- What steps the employee can take to build on his/her strengths;
- What specific steps can be taken to address opportunities for improvement;
- How much improvement in specific areas of performance should be achieved and within what time frame;
- What can be done if problems are encountered in achieving these goals between now and the date of the next discussion;
- What support the supervisor/manager can provide to help the employee successfully complete his/her action plan.
- Record each specific recommendation on the form.

4. Progress Review

The objective of the performance management policy is to provide ongoing feedback, coaching and support to employees. Often this can be done on an informal basis. In some cases where there are particular concerns regarding performance and/or development, it may be valuable to schedule a time for a follow up discussion to review progress on the action items identified in the performance management plan.

- Discuss any issues that have been encountered and what can be done to resolve them. The purpose of the progress discussion is to maintain the employee's

- motivation and to keep the goals realistic.
- Emphasize your availability for continuing support, guidance and resources.
- Work with the employee to identify and access the most relevant development opportunities.

5. Ongoing Communication with the Employee

A fundamental component of successful coaching and performance management is regular communication between the supervisor and the employee. Building effective work relationships is essential to achieving desired results. Regular two-way communication between the employee and supervisor helps build this relationship.

- Brief discussions should take place whenever appropriate. Formal sessions should be scheduled at least once during the performance management plan period to discuss what is going well and what can be improved.
- Use these sessions to describe rather than evaluate performance. Inquire about any changes in the work situation since the previous discussion and review any learning and/or development plans that were agreed as to as part of the process. Determine if there are any obstacles blocking success.
- Ask about resources that the employee may need to accomplish their objectives.
- Acknowledge accomplishments during this period. Discuss new priorities in the organization so the employee can re-focus efforts, if appropriate.
- Modify the employee plan document to reflect any changes.
- It is important for both parties (supervisor and employee) to maintain open communication in order to keep each other informed of work progress and work together to resolve problems if they occur. It is far better to resolve problems sooner before they become less manageable.
- A key principle that encourages employees to accept constructive feedback is to be "hard on the problem, and soft on the person." The focus should be on correcting the problem or behavior, not on chastising the employee. The performance management planning discussion is an assessment of performance and should not be punitive. If effective performance management is occurring, this meeting will not be, nor should it be the time an employee hears about performance issues.
- A useful motto for the performance management plan discussion should be "no surprises." Through this approach, you can reduce the likelihood of the employee becoming emotional or resistant during the meeting.
- Strive to provide continual feedback concerning expectations and performance. When things are going well discuss how and why this is so. When things are not going well discuss what needs to be done to make them right. When an employee is not doing things

properly, get together and plan what needs to be done to correct the matter. If there is a performance gap, help the employee understand the cause and the action necessary for correction. Support plans for professional development.