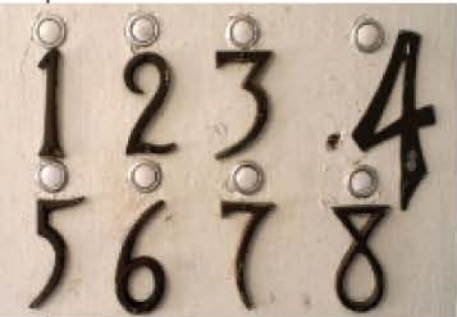


# “Ugly” Performance Review Scenarios: What to Say & Do



Coaching for leaders, managers & teams

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**December 16, 2009**

# Updates

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- December newsletter [posted](#)
- Coaching webinar series begins February 2
- SMARTie Goals [webinar](#) January 13, 2010
- New videos being taped tomorrow

# This Doesn't Sound Very PC

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Hey, didn't you go to Berkeley?

# Common Excuses: “Why aren’t you managing performance?”

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- A. I don’t have the time
- B. I don’t know what to say
- C. Employees don’t listen when I tell them
- D. Managers aren’t sure what to say besides, “Move faster and ask less questions”
- E. All of the above

# Frequent Missteps

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- Rush to judge
- Not clear about consequences
- Using aggressive behaviors or language
- Rush to fire
- Rush to hire



# Why is Navigating Performance Challenges So Difficult?

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It's easier to do nothing.  
Initially.

# Why Does this Happen?

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## Why doesn't he get it?



**“No one told me what to do.”**



**“ . . . And I was doing a bad job.”**



# The Primary Solution



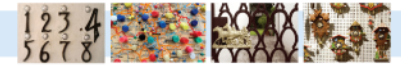
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# Our “Ugly” Situations



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1. **Top** performer who has applied for internal positions and wants to grow with the company and you see very few promotional opportunities in the next 6-12 months.
2. **Struggling** performer who is also slightly aggressive when you share constructive feedback.
3. **Middle** of the road performer who focuses, solely, on metrics—not how to accomplish tasks. How he currently accomplishes tasks is far from ideal.
4. **Middle** of the road performer whose former manager (still with the company) inflated her performance rating. You now need to share with her new, lower rating.
5. **Top** performer who will, again, learn that there will be no raises this year.

# 1. Top Performer Who Wants Promotion



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**Top** performer who has applied for internal positions and wants to grow with the company and you see very few promotional opportunities in the next 6-12 months.

# 1. Top Performer Who Wants Promotion

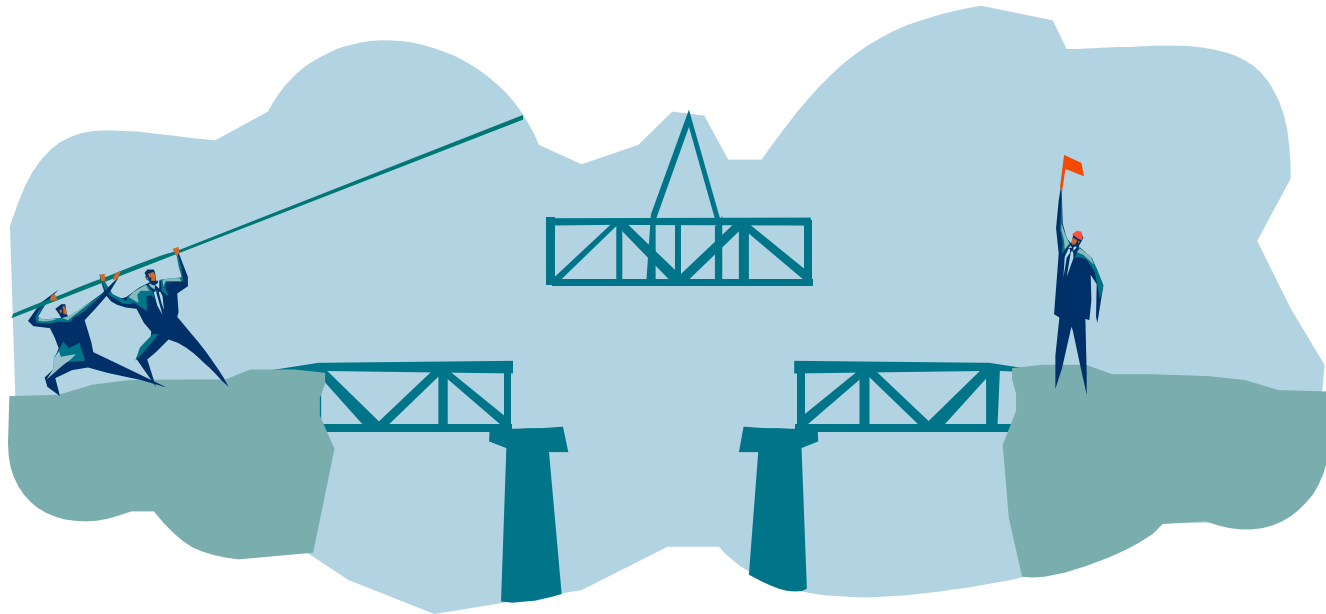
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Consider:

1. How she feels
2. How you feel



*Before you run, you walk. Before you lead, you manage—well.*

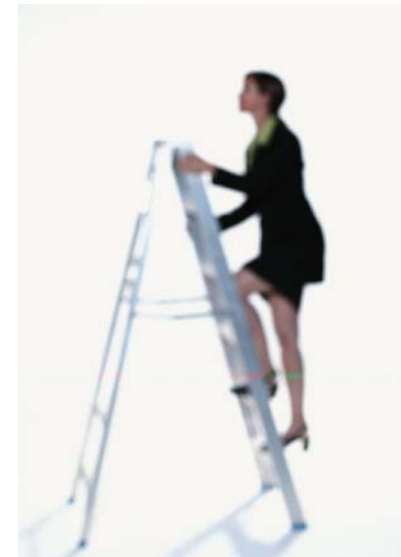
# Guidelines for Promotions



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- When: anniversary of hire date or calendar year?
- How much
- Title change (be cautious of inflation and bowing to employee wishes)
- WHY



# 1. Top Performer Who Wants Promotion

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- ✓ Acknowledge and thank
- ✓ Be honest and realistic
- ✓ Create next steps together
- ✓ If necessary, let go

# 1. Top Performer Who Wants Promotion

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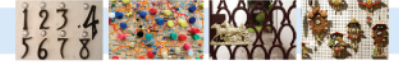
Examples of what to say:

- I feel, as I expressed in your review, that you are an incredible asset to [COMPANY]. Both the work you do and the way you approach it are amazing.
- Beth, I want to thank you for applying for open positions this year. I know you are disappointed that you didn't move into one of them. How do you feel about that now? [important for her to vent, if she wants to]

# 1. Top Performer Who Wants Promotion



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Examples of what to say (continued):

- Tell me what positions within [COMPANY] you'd like to learn more about [perhaps she can shadow one person in a different department each month]?
- What do you feel are your strengths? What do you want to do more of? I am sure that if we work together closely on this, we will be able to identify tangible opportunities for you to grow in your role.
- I was thinking that having a mentor outside of our department would be interesting for you. What do you think?

# 1. Top Performer Who Wants Promotion

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- ✓ Acknowledge and thank
- ✓ Be honest and realistic
- ✓ Create next steps together
- ✓ If necessary, let go

## 2. Struggling Performer Who is Aggressive

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Struggling performer who is also slightly aggressive when you share constructive feedback

## 2. Struggling Performer Who is Aggressive

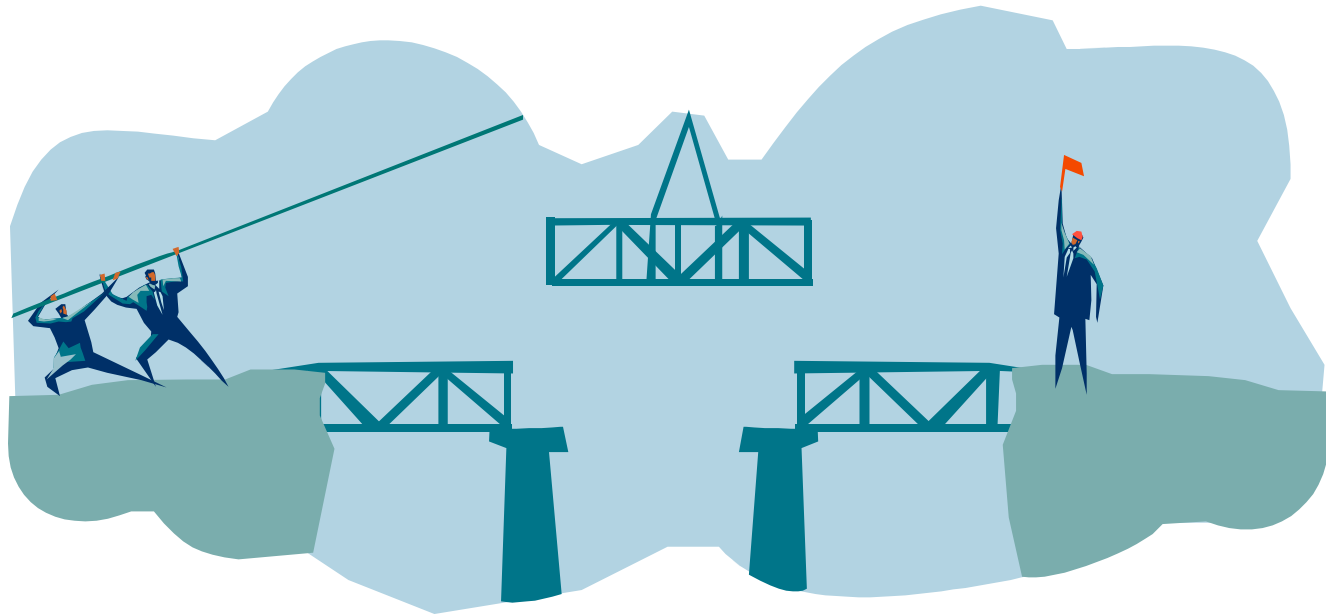
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Consider:

1. How he feels
2. How you feel



*Before you run, you walk. Before you lead, you manage—well.*

# Analyze Why They Are Failing

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1. They don't know what they are supposed to do
2. They don't know how to do it
3. They don't know why they should do it
4. They think they are doing it (lack of feedback)
5. There are obstacles beyond their control

Fournies, *Why Employees Don't Do What They're Supposed To Do and What To Do About It.*

## 2. Struggling Performer Who is Aggressive

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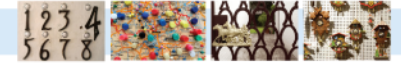


- ✓ Separate the issues, initially
- ✓ Have many examples ready. Use examples that indicate how his behavior affects the business in a negative manner.
- ✓ Pause and wait for reaction
- ✓ Don't shrink away
- ✓ If behavior is aggressive, you must not feed the fire: tackle poor performance first
- ✓ If necessary, after the review is complete, consider a PIP

## 2. Struggling Performer Who is Aggressive



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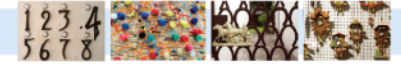
Examples of what to say:

- When I look at all of 2009, I feel you did not consistently attempt to improve your performance unless I prompted you to do so, as I would like you to do so and as I had expressed to you. What do you think?
- I know you can accomplish most of your job activities, including XYZ. Now we need to discuss why some of them were not accomplished or accomplished late or in an ineffective manner. Please tell me what you do think.
- Hence, in our next 1:1, we will review the points discussed today and create action steps on how you can make consistent and noticeable improvements in the tasks you complete and the ways you complete them.

## 2. Struggling Performer Who is Aggressive



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Examples of what to say (continued):

- My job is to support you. I am here to discuss specifics and answer questions, whenever you need insight from me. It is absolutely acceptable to ask questions and to ask for help. Please let me know what I can do to help you.
- One of the areas I think you were challenged with this year is effective listening and being open and responsive to constructive criticism and feedback. We all know it's not always easy to hear but it is intended to help you be successful.
- What do you think you can do to improve in this area?
- What can I do to assist?
- What additional examples can I provide?
- What ideas do you have?

## 2. Struggling Performer Who is Aggressive

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- ✓ Separate the issues, initially
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# PIPS: What



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A formal, written plan that:

- Identifies consistent performance deficiency,
- Outlines specific goals for improvement,
- Establishes precise timelines, and
- Details consequences of failure to meet goals and timeline.

# PIPS: Why

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1. To communicate in writing performance deficiencies,
2. To highlight the severity of the performance issues,
3. To provide a paper trail, and
4. To help an employee improve and bring performance to a minimum level (this is the reason we forget)

# PIPS: When



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- When normal oral and written feedback (and coaching) have not resulted in consistently meeting the desired performance level
- When an employee has repeatedly shown an inability (conscious or not) to respond to and act on feedback
- Other situations as deemed necessary by HR and the manager

# Guidelines for Terminations

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- Documentation best practices
- At-will employment
- State and federal regulations
- Coaching plan
- PIP
- Logistics of the meeting
- Communication to the rest of the company

# 3. Middle Performer Whose Methods Are Not Ideal

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**Middle** of the road performer who focuses, solely, on metrics—not how to accomplish tasks. How he currently accomplishes tasks is far from ideal.

# 3. Middle Performer Whose Methods Are Not Ideal

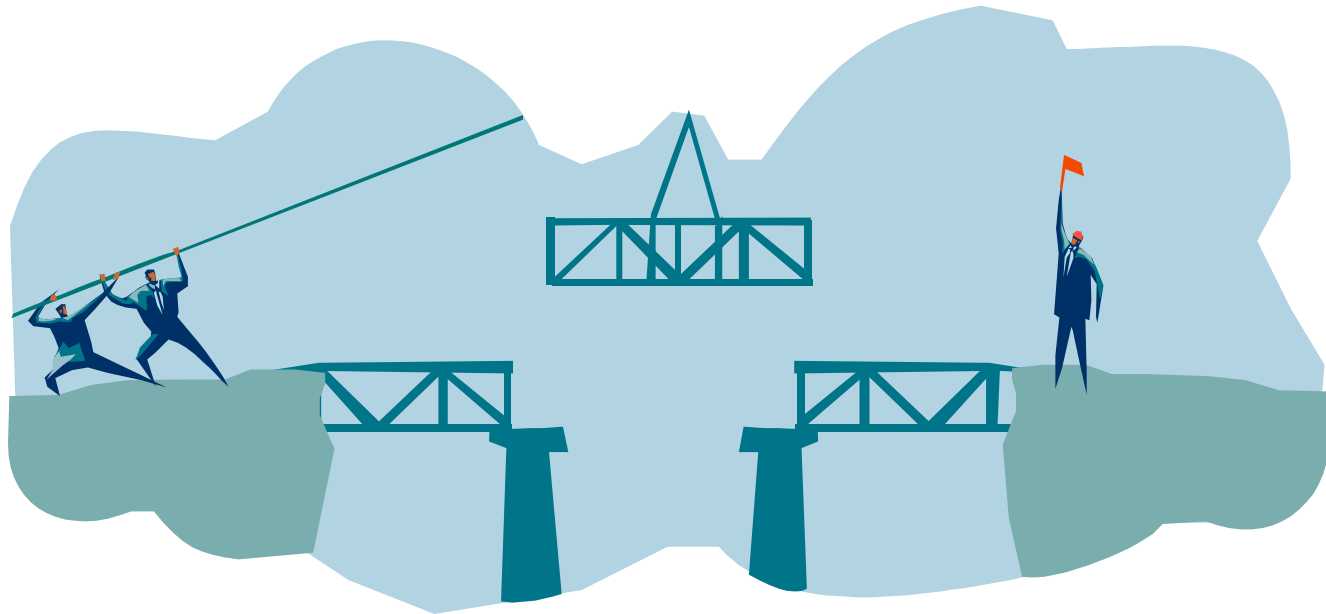
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Consider:

1. How he feels
2. How you feel



*Before you run, you walk. Before you lead, you manage—well.*

# 3. Middle Performer Whose Methods Are Not Ideal

bt

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- ✓ Acknowledge and thank
- ✓ Have examples of different behaviors and how they affect, in a subtle way, end results
- ✓ Have data from stakeholders
- ✓ Create next steps together
- ✓ Emphasize that leaving bodies in your wake is not OK

# 3. Middle Performer Whose Methods Are Not Ideal



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Examples of what to say:

- Let us first talk about which goals you met. These are the goals where you met the expectations I set for you. Details, details, examples . . .
- These are the behaviors you exhibit that are desirable. I would like you to continue using those behaviors as they help us reach our goals.
- The behaviors you need to alter so that we can meet and exceed our goals are . . .

# 3. Middle Performer Whose Methods Are Not Ideal



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Examples of what to say (continued):

- How can you encourage solicit feedback from your peers? How do you feel they currently view your methods?
- Let's review these examples as a role play. I'll be you and you be the customer.
- Remember our mission as [COMPANY]. How can you consider our values and incorporate them into how you work?

# 3. Middle Performer Whose Methods Are Not Ideal

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- ✓ Acknowledge and thank
- ✓ Have examples of different behaviors and how they affect, in a subtle way, end results
- ✓ Have data from stakeholders
- ✓ Create next steps together
- ✓ Emphasize that leaving bodies in your wake is not OK

## 4. Middle Performer Whose Manager Inflated Her Rating

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**Middle** of the road performer whose former manager (still with the company) inflated her performance rating. You now need to share with her new, lower rating.

# 4. Middle Performer Whose Manager Inflated Her Rating

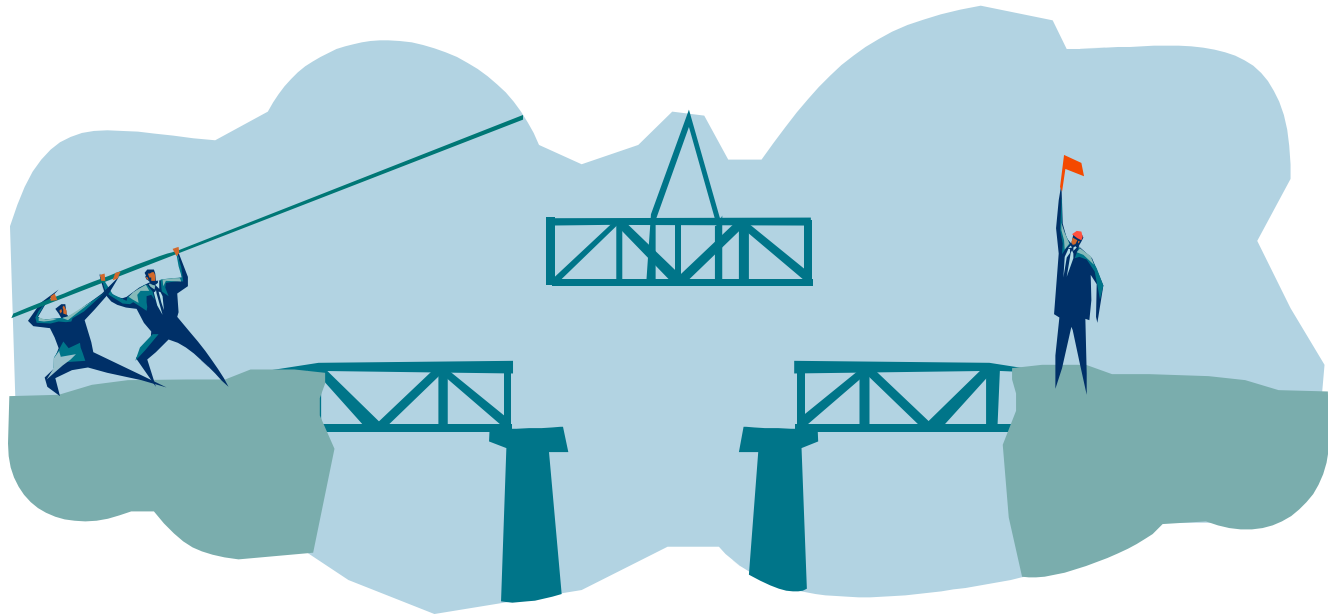
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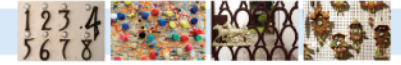


*Before you run, you walk. Before you lead, you manage—well.*

# 4. Middle Performer Whose Manager Inflated Her Rating

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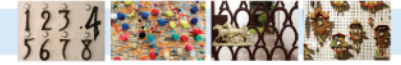


- ✓ Acknowledge and thank (take your time)
- ✓ Be upfront right away
- ✓ Don't blame the other manager or the company
- ✓ Be careful with "I'm sorry"
- ✓ Have data from stakeholders
- ✓ Create next steps together

# 4. Middle Performer Whose Manager Inflated Her Rating

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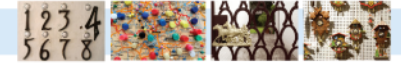
Examples of what to say:

- Abby, I need to let you know that some feedback I'm sharing is a surprise. My evaluation of your performance is different from how your former manager rated you.
- I understand you are upset . . .
- Let us first talk about which goals you met. These are the goals where you met the expectations I set for you. Details, details, examples . . .

# 4. Middle Performer Whose Manager Inflated Her Rating

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Examples of what to say (continued):

- These are the behaviors you exhibit that are desirable. I would like you to continue using those behaviors as they help us reach our goals.
- The behaviors you need to alter so that we can meet and exceed our goals are . . .
- How can I help you?
- Again, I acknowledge this is a surprise to you.

# 5. Top Performer Who Isn't Getting a Raise

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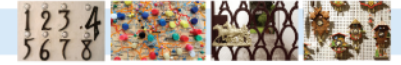


- ✓ Push for a raise or bonus!
- ✓ Acknowledge and thank
- ✓ Be honest and realistic
- ✓ Have next steps ready on developmental opportunities
- ✓ If necessary, let go

# It's Not a One Way Street

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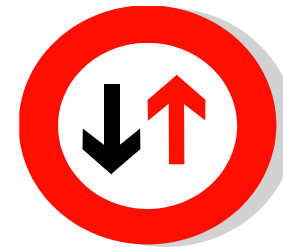
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A feedback loop is exactly that.

Both sides—the manager and the employee—need to:

- ✓ Push and pull and
- ✓ Give and get.



# Feedback Loop



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# Employees Join Companies and They Leave . . .

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When asked why they are leaving a company, employees say:

1. Poor management
2. Lack of career growth
3. Poor communication
4. Lack of teamwork
5. Pay
6. Lack of recognition

\* 2005 Saratoga Institute survey of 10,000+ employees

# Thank You

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## Thanks for being here.

## Happy Holidays!

**Leila Bulling Towne**

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