

Performance counseling: Four strategies for success



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Something every supervisor must do periodically is appraise their staff performance. The key factor for success is the use of the proper strategy to drive the agenda for the meeting. Experience dictates that there are four key strategies to use for successful execution of these performance reviews, and the proper strategy choice is based on the overall performance of the employee.

An important element of every supervisor's job is directing and appraising employee performance. Companies recognize this and most have formal procedures in place to ensure this takes place on a periodic basis. These procedures include formats to record evaluations, plan development activity, and describe basic parameters. In large firms, supervisors are trained to the process and provided basic skills for conducting sessions.

However, this preparation may prove inadequate when the supervisor finally needs to sit down with their staff member and conduct the interview. The moment can be stressful for both parties, but it need not be for a properly prepared manager. The key factor for success is the use of the proper strategy to drive the agenda for the meeting. Our experience dictates that there are really only four key strategies to use for successful execution of these performance reviews, and the proper strategy choice is based on the overall performance of the employee. These strategies can be defined according to four levels of achievement and interview objectives:

1. Superior Performance (retain, recognize, groom for promotion)
2. Consistently Meets Standards (retain, maintain standard)

3. Uneven Performance (define gap, improve results)
4. Inadequate Performance (re-assign or release)

Each of these four levels of employee performance requires specific steps to gain the best results from the counseling interview. These desired results are based on four defined interview objectives. With the superior performer, the objective of the session is to provide recognition of achievement and to plan future development opportunities (i.e. job expansion or rotation, advanced training, mentoring). The ultimate goal is to retain the employee as long as possible and strengthen potential for promotion or more demanding assignments. Of course, once this planning has been done, it is critical then for management to actually provide these development initiatives. This can sometimes prove difficult because it means that for short intervals the work unit must do without the superior performer's presence as they rotate between jobs or travel for training programs. However, if this planning is done and nothing comes from it, frustration may result in a premature departure of the professional.

Likewise, the goal of counseling consistent performers - those judged not to be promotable, is to recognize their contributions. The key in this interview is to focus on

the maintenance of ongoing levels of action, to retain the employee as a productive team member, and to provide for development opportunities to strengthen existing skills that support work demands. Some employees realize their capabilities and are only interested in stability. Others may have unrealistic views of their potential. In this case, the supervisor must walk a delicate balance to provide reasonable investment in development without making promises that will not come to fruition.

The third performance category, that of the staff member who is a deficient performer in one or more areas, can often be the largest segment of team make-up. Addressing knowledge, skill or motivation weaknesses and planning improvements must be done jointly. There should be clear evidence available to indicate the gap in current efforts and to target future improvements and desired results. Usually gaining such individual workplace improvements requires several supporting mechanisms (such as clear expectations, skill upgrades, ongoing feedback, incentives to improve, job aid or tool additions).

The proven critical factor for success with this course of counseling is to create a written action plan for moving forward. Often, this only needs to be a single page. It includes very

specific developmental tasks, realistic timelines, and identified support resources. Both the supervisor and performer should sign the plan to pledge engagement. Depending on the nature of the actions, the two should then meet briefly weekly or monthly to clear obstacles and measure progress toward the target level of achievement.

The final category of counselee is that of the inadequate performer. This is the individual whose performance cannot be improved, despite recurring attempts to build knowledge and skills, which should be documented. In some cases, there may only be a mismatch between available skills and those demanded by the job. In other cases, sufficient motivation may be lacking to achieve competent performance. Here the objective of the interview is to recognize the staff member for personal value, while at the same time informing them of the need for a job re-assignment (if appropriate) or termination. Prior to these discussions, it is important to consult with your HR experts to gain advice and legal guidance.

These four strategies, while they take experience and skill to perfect, allow any manager to make great strides in performance coaching. Each of the four processes involves step-by-step conversations that need to be learned and practiced. However, when put into daily use, they help change previously stressful meetings into valuable opportunities to improve your staff's skills and your work units' success.



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