How To Address Performance Concerns

A Management Development Program
Workbook

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Participants will:

- Explore the reasons for confronting performance concerns.

- Identify common performance concerns.

- Determine how to address employee behavior.

- Discuss the benefits of documentation.

- Identify how to confront performance concerns.

- Discuss how to handle a verbally or physically abusive person.

Why Confront Performance Concerns?

1. Develop your staff.

2. Protect your organization.

3. Create a positive work environment.

Why Confront Performance Concerns?

Three main reasons for confronting performance concerns:

1. Develop your staff

- Respect efforts.
- Clarify expectations.
- Save on hiring costs.
- Reduce turnover rates.
- Celebrate contributions.
- Provide useful feedback and training.
- Make the most of current employees.
- Create opportunities for improvement.
- Reduce recruitment and training costs.
- Encourage education and development.

2. Protect your organization

- Minimize overall morale issues.
- Avoid discrimination claims and litigation.

3. Create a positive work environment

- Improve overall communication.
- Distribute work fairly and evenly.
- Emphasize that everyone's performance matters.
- Create a work culture of safety, trust, fairness, consistency and professionalism.

Why Confront Performance Concerns?

If you don't address performance problems, you risk negatively affecting employees who do meet their performance objectives. By addressing performance consistently and fairly, you send a clear message that everyone's performance matters.

Four Common Areas of Performance Concerns

There are four common areas of performance concerns:

1. **Skills and abilities.**

2. **Work relationships.**

3. **Task performance.**

4. **Behavior and conduct.**

Four Common Areas of Performance Concerns

1. Skills and abilities

2. Work relationships

3. Task performance

4. Behavior and conduct

Four Common Areas of Performance Concerns

1. Skills and abilities

Skill = dexterity, expertness, an art, trade or technique especially one that requires the use of hands or body.

Ability = the power to do something, a natural talent.

Skills can be taught and learned. Ability is innate.

Step 1. Is this a skill or ability issue?

Skill issue = Address with training.

Ability issue = Decide if this is the right person for the task or job.

Step 2. If it is an ability issue, ask yourself:

- Can the position be changed to better match the employee's abilities?
- Can the employee be reassigned to another position within the company that better matches their abilities?
- Can you encourage the employee to consider other employment opportunities?

Four Common Areas of Performance Concerns

2. Work relationships

Work relationships can impact morale, motivation and stress levels of you and your employees. How employees interact with one another is just as important as technical skills and competence.

Employees don't have to necessarily like one another, but they do need to be able to put aside differences to work together effectively.

3. Task Performance

Discuss that excessive sick leave may vary from job to job, from a few days to a week or two. On-the-job absenteeism is also frequently referred to as "presenteeism." On-the-job accidents may involve workers' compensation.

Obstinacy or excessive stubbornness in the workplace, in particular as it relates to resistance to change, could result from several reasons:

- Feeling the change as a possible threat.

- Lack of certainty about how the work change will translate into day-to-day experience.

- Frustration that the change doesn't make sense.

- Fear that change in the employee's responsibilities could reveal substandard work performance or lack of work effort.

4. Behavior and conduct

Behavior = our response to specific circumstances.

Conduct = our actions toward one another.

Conduct involves how employees cooperate on a project or how employees participate and contribute to a project.

Addressing conduct problems can be difficult, sensitive and emotionally charged. It can also prove challenging for supervisors and Human Resources personnel to define an appropriate course of action for how to best handle eccentric, abnormal or bizarre employee behavior, which may include: political or religious proselytizing, practical jokes, ritualistic behavior, inappropriate attire, inappropriate language, vendettas or gossip. It is important to focus on the serious impact of the behavior to make sure an appropriate course of disciplinary action is taken.

Disciplinary actions should be clearly defined and applied fairly with all employees at all times. Lack of disciplinary action, unfair disciplinary action or inappropriate disciplinary action could result in arbitration or litigation.

Examples of Behavior and Conduct Issues

"Off-the-job" absenteeism

- Leaving work early.
- Unauthorized leave.
- Excessive tardiness.
- Excessive sick leave.
- Frequent unscheduled short-term absences.
- Peculiar, bizarre or increasingly improbable excuses for absences.
- Higher absenteeism rate than other employees for minor illnesses.

"On-the-job" absenteeism

- Long coffee breaks.
- Physical illness on job.
- Absent from post more than task requires.
- Frequent trips to water fountain, coffee machine or bathroom.

High accident rate

- On-the-job accidents.
- Frequent trips to the nurse's office.
- Off-the-job accidents affecting attendance.

Difficulty concentrating

- Jobs take more time.
- Work requires great effort.
- Employee is easily distracted.

Confusion

- Difficulty in recalling instructions, details, etc., as well as past mistakes.
- Increasing difficulty handling complex assignments.

Inconsistent work patterns

- Alternate periods of high and low performance.

On-the-job Obstinacy

- Doesn't change easily.

Generally lower job efficiency

- Wastes material.
- Misses deadlines.
- Makes poor decisions.
- Makes mistakes due to inattention or poor judgment.

Eight Questions To Decide on Actions

To decide on an appropriate course of action, ask yourself these eight questions:

1. Did the employee's actions damage equipment or products?

2. Did the employee's actions disrupt the work flow?

3. Did the employee's actions create a safety hazard?

4. Should the employee have known better?

5. Is the behavior correctable?

6. Did the behavior violate the law?

7. Did the behavior damage the organization's image, customer relations or competitive position?

8. Has the employee's action damaged morale and the overall workplace culture?

Eight Questions To Decide on Actions

To decide on an appropriate course of action, ask yourself these eight questions:

1. Did the employee's actions damage equipment or products?

- Can you quantify the dollar value on minor, moderate or serious violations and define appropriate consequences for each?

- Can you differentiate between willful and unintentional damage.

- What caused the unintentional damage? Incompetence? Ignorance? Carelessness?

- How can you assess the willful damage? Was the damage accidental? Was the behavior deliberate but the damage unintended?

- Was both the behavior and the damage intentional?

2. Did the employee's actions disrupt the work flow?

- Was overall work routine disrupted enough to warrant severe discipline?

- Can you determine the extent to which the employee's behavior was intentional, accidental or preventable?

- Can you determine expenses incurred by the company, such as those involving production or service delays?

Eight Questions to Decide on Actions

3. Did the employee's actions create a safety hazard?

- Was the safety of other employees or customers at risk?

- What kind of safety risk was it?

4. Should the employee have known better?

- Was it an unskilled employee?

- Was it a supervisory, skilled or professional employee?

- Did the employee receive the appropriate education and training?

- Were the appropriate policies, procedures and standards outlined and clearly communicated?

- Was the employee under the stress of time constraints or in an unusually high stress situation either at work or outside of work?

5. Is the behavior correctable?

- Can a meeting with a supervisor or HR representative resolve the issue?

- Can additional training resolve the issue?

- Does the behavior result from an employee misusing drugs or alcohol and would they benefit from a treatment program?

- The About Professional Support section of this presentation will offer more information about options available to them.

Eight Questions to Decide on Actions

6. Did the behavior violate the law?

- If the activity was illegal and occurred while the employee was at work, you must take disciplinary action.

- Depending on the situation, you may or may not want to press charges or have to press charges. If the illegal activity occurred on the employee's own time and not while at work, the situation may require that you consult with your organization's legal team and/or state fair employment office for guidance to make sure any disciplinary actions are not discriminatory against the employee.

7. Did the behavior damage the organization's image, customer relations or competitive position?

- Did the employee's behavior, dress or appearance go against your organization's standards?

- Did the employee's behavior alienate customers?

8. Has the employee's action damaged morale and the overall workplace culture?

- Did the employee create an uncomfortable or hostile work environment?

By answering these questions, managers and Human Resource personnel can better define the concern, issue or problem and better formulate an appropriate response.

Benefits of Documentation

Documentation of performance concerns is one of the most effective management tools available to you.

Inadequate documentation puts you and your organization at a disadvantage if an issue should require a hearing, arbitration or litigation.

Work with your supervisor and Human Resources Department so you carefully follow your organization's existing polices on how to document problematic employee behavior. Start working with them early on so you have an accurate record of the problem over time.

Documentation should always:

- Be based on objective, specific and quantifiable performance issues.
- Include specific times and dates, performance/behavior observed.
- Include a description of the effects of the behavior on the workplace.

Benefits of Documentation

Accurate documentation has many benefits:

- Prevents "your word against mine"

- Lets the record "speak for itself"

- Gives employees specific evidence of how performance affects others

- Helps the supervisor recognize and record a pattern of unsatisfactory performance

- Supports the supervisor when confronting the employee

You can use the supervisor checklist in the workbook to assist them in identifying specific performance or behavioral concerns that should be documented.

Supervisor's Checklist

High accident rate

- ☐ Accidents on the job.
- ☐ Accidents off the job.

Decreased job efficiency and productivity

- ☐ Missed deadlines.
- ☐ Poor decision making.
- ☐ Lack of focus; fragmented.
- ☐ Makes excessive mistakes.
- ☐ Low interest in assignments.
- ☐ Increased time/effort to do work.
- ☐ Difficulty recalling own mistakes.
- ☐ Misuse or waste of materials/supplies.
- ☐ Drop in productivity and/or quality of work.
- ☐ Misses or comes late to important meetings.
- ☐ Starts or finishes assignments late (if at all.)
- ☐ Complaints from customers about employee.
- ☐ Uses poor judgment, delays decision-making.

- ☐ Difficulty in recalling instructions, details, etc.
- ☐ Mistakes due to inattention or poor judgment.
- ☐ Policies, procedures, regulations not followed.
- ☐ Improbable excuses for poor job performance.
- ☐ Erratic productivity (periods of highs and lows.)
- ☐ Increasing difficulty handling complex assignments.
- ☐ Excessive dependency on supervision and direction.

Inappropriate employee appearance

- ☐ Poor hygiene.
- ☐ Sloppy appearance.
- ☐ Inappropriate clothing.

Supervisor's Checklist (Continued)

Absenteeism

- ☐ Leaving work early.
- ☐ Excessive tardiness.
- ☐ Excessive sick leave.
- ☐ Patterned absenteeism.
- ☐ Improbable excuses for absences.
- ☐ Unreported or unexcused absences.

"On-the-job" absenteeism (Presenteeism)

- ☐ Physical illness on the job.
- ☐ Long rest and meal breaks.
- ☐ Absences from work area more than job requires.

Poor employee relationships on the job

- ☐ Frequent irritability with others.
- ☐ Unreasonable resentments/grievances.
- ☐ Unwilling to compromise/work as a team.
- ☐ Overreaction to real or imagined criticism.
- ☐ Complaints about employee from co-workers.

- ☐ Friction with co-workers, supervisors or clients.

Problem behavior

- ☐ Abruptness.
- ☐ "CYA" behavior.
- ☐ Rigid or inflexible.
- ☐ Emotional outbursts.
- ☐ Erratic mood swings.
- ☐ Hostile or aggressive.
- ☐ Withdrawn/unresponsive.
- ☐ Exaggerated self-importance.
- ☐ Overly sensitive or suspicious.
- ☐ "No problem, whatever you say" attitude.
- ☐ Excessive, inappropriate or disruptive talking.
- ☐ Excessive amount of personal telephone time.
- ☐ Game playing which interferes with getting work done.

Develop a Consistent Approach

Remember that there may be several explanations for a performance concern, issue or problem. If you've decided it's an employee issue, not the result of the organization, address the performance concerns directly with the individual. Try not to diagnose or guess at the reasons for the performance issue. Jumping to conclusions can result in ignoring or denying a problem, making an unfair or illegal assumption, or addressing a problem inappropriately.

Any behavior that's unusual, inappropriate or unsatisfactory can be addressed in specific, concrete terms. You don't have to wait for job performance to be impaired before you address a problem.

The earlier problems are identified, the easier they are to resolve, and the less distress individual employees and your workplace as a whole experience. All issues, concerns and problems should be addressed fairly and consistently.

Professional guidance can come from a variety of sources, including your manager, Human Resources or the toll-free number. The About Professional Support pages at the end of the workbook and presentation offer more suggestions.

Develop a Consistent Approach

Follow these six steps to develop a consistent approach to discipline:

1. Communicate standards and expectations.

2. Intervene immediately.

3. Impose appropriate, consistent consequences.

4. Apply the same standards to all employees, fairly.

5. Enforce progressive discipline.

6. Get professional advice or guidance, if necessary.

Develop a Consistent Approach

Follow these six steps to develop a consistent approach to discipline:

1. Communicate standards and expectations.

Pay attention to work performance. Make sure that employees understand job expectations, performance standards and how they're expected to behave towards co-workers and management.

2. Intervene immediately.

Meet with the employee, clarify the problem and agree on an action plan.

3 Impose appropriate, consistent consequences.

Every time performance is a problem, discuss it with the employee.

4. Apply the same standards to all employees, fairly.

Apply policies and procedures fairly and consistently, and expect everyone to exhibit a certain acceptable standard of performance. Don't let seniority, a personal relationship or sympathy deter you from an honest evaluation of an employee's performance. Do not discuss your observations with other employees.

5. Enforce progressive discipline.

Follow the steps in your disciplinary policy if performance problems continue. Most employers follow a standard policy of counseling, verbal warning, written warning, suspension and termination.

6. Get professional advice or guidance, if necessary.

Consult your organization's legal and/or Human Resources Department for more serious situations. The About Professional Support pages at the end of the workbook and presentation offer more suggestions.

Positive Confrontation

Confronting a performance issue, concern or problem does not have to be a negative interaction or experience for you and your employees. Even though you're discussing problems, they can be approached from a positive perspective and have a positive outcome. It's important not to spend too much time going over past mistakes or faults. Focus on specific examples of the employee's behavior to clarify a point. Be sure to document all examples of the employee's behavior.

Positive Confrontation

Follow these three steps for positive confrontation:

1. **Approach the employee positively.**
2. **Empathize with the employee's perspective.**
3. **Strive for a win-win situation.**

Positive Confrontation

Follow these three steps for positive confrontation:

1. Approach the employee positively.

Start your discussion with what the employee is doing right or has been doing well. Be respectful. Convey your belief that the problem is one that can be identified and resolved. Give the employee concrete steps so they can be successful in changing their behavior.

2. Empathize with the employee's perspective.

Ask the employee for their perspective of the issue. There may be an organizational problem that's negatively affecting the employee's ability to do their job about which you are not aware. Be willing to redefine the problem, if appropriate to do so.

3. Strive for a win-win situation.

The goals for a performance discussion are to clarify the problem, discuss necessary improvements, and the resources needed for compliance. At the conclusion of the discussion, the employee should understand the goals and leave with a positive sense from the discussion. Let the employee know that you have confidence in their ability to make the necessary improvements in performance.

Meeting To Discuss Performance Concerns

Before the Meeting

1. Observe and plan.

2. Research and document.

3. Define your views.

4. Get assistance.

During the Meeting

1. Describe concerns clearly.

2. Clarify job expectations.

3. Create an action plan.

4. Offer resources.

After the Meeting

1. Follow up.

2. Encourage and reinforce.

3. Follow through.

Meeting To Discuss Performance Concerns

Before the Meeting

1. **Observe and plan.**

2. **Research and document.**

3. **Define your views.**

4. **Get assistance.**

1. Observe and plan.

It's important to observe the job performance problem/concerns that you're planning to discuss with the employee. You may have received some information secondhand. While important, the meeting will be more successful if you have firsthand observations and specific examples you can document and share with the employee. Start your statements with "I have observed …" to focus the conversation.

If an employee's performance is correctable, the goal of the discussion is to create an action plan for changing the unacceptable behavior. If it's not correctable, the discussion may focus on other opportunities available to the employee.

To prepare for the meeting, assemble information ahead of time. Review the employee's job description and previous performance evaluations. Compare the employee's performance to your organization's performance standards.

2. Research and document.

Research the employee's work performance history and patterns to help identify the issue. If an employee's pattern changes and there isn't any apparent reason, focus part of the discussion on reasons for that performance change. Be prepared to calmly listen to the employee's feedback about the organization. Document the problems in an objective manner. Describe specific behaviors and document dates, times, the nature of the incident and who was involved. Compile your documentation to present in the meeting, if appropriate.

Before the Meeting

3. Define your views.

Be sure to get a handle on your own perspective and feelings about an individual employee before meeting with them. Try to think through any apprehension you may have about a potential conflict or negative feedback before meeting with them. By understanding your own emotions ahead of time, you are better able to calmly handle possible negative reactions. Remember, you are not the employee's counselor. You are their manager directing them to the appropriate resources and a new course of behavior. If your feedback is presented in a calm, clear and professional manner there should be no need to apologize for what you are communicating to them as their manager. Allow time for both you and your employee to share thoughts in a non-defensive conversation.

Prior to the meeting:

- Review the work standards and expectations you have for the employee.

- Prepare an action plan with a timeline that lists benchmarks and goals for the employee. Include training and education options if the performance issues involve a lack of technical knowledge.

- If the action plan involves behavior changes, provide a clear definition for what behaviors need to change and how the changes will be measured.

- Be ready to revise the action plan based on the employee's feedback and perspective.

4. Get assistance.

Identify resources in your organization. You may want to consult these resources before your meeting, depending on the seriousness of the issue or behavior. Your manager, your Human Resources department and your company's legal department can provide information to help make sure any disciplinary actions are consistent within the organization. Human Resources can also assist in clarifying the problem, interpreting company policies and providing options for solutions. You may also contact your toll-free number for a Management Consultation for recommendations on how to address potentially difficult situations. The About Professional Support pages in your workbook have more information about resources available to you.

Meeting To Discuss Performance Concerns

Before the meeting	1. Observe and plan. 2. Research and document. 3. Define your views. 4. Get assistance.

During the meeting	1. Describe concerns clearly. 2. Clarify job expectations. 3. Create an action plan. 4. Offer resources.

After the meeting	1. Follow up. 2. Encourage and reinforce. 3. Follow through.

Meeting To Discuss Performance Concerns

During the Meeting

1. **Describe concerns clearly.**
2. **Clarify job expectations.**
3. **Create an action plan.**
4. **Offer resources.**

1. Describe concerns clearly.

Describe the issues with documented details. Explain your expectations for work standards and performance. Try to find out if anything in the work environment or organization is contributing to the issue. Gather facts from the employee. Provide specific examples of performance problems as well as specific suggestions for correcting the problem. Focus on the problem, not the person. Saying "your sales are down" is preferable to "you're not a good sales person."

Keep the focus on professional issues. If the employee brings up a personal problem or issue, acknowledge it and explain you will go into resources that are available to them later in the meeting.

2. Clarify job expectations.

Outline the employee's role and responsibilities. Some expectations may need to be more clearly defined. For example, if an employee is scheduled to be at work at 8:30 a.m. and is continually tardy, you may need to define "on time" as at your desk and ready to take calls by 8:30 a.m., not just on-site by 8:30 a.m.

3. Create an action plan.

- Define specific goals and expectations for improvement.

- Ask the employee for suggestions on how they can improve or change.

- Emphasize the benefits to the employee if they change their behavior and improve performance.

- Clarify consequences if the employee does not change their behavior or performance.

- Summarize the discussion. If you're unsure if the employee understands the issues, ask them to summarize the discussion in their own words.

- Encourage questions from the employee during and after the meeting.

- Provide a timeline for the employee that includes a follow-up meeting with you.

4. Offer resources.

If the employee raises a personal problem in the meeting, take time to explain the resources your organization has available for them. You may need to explain that your role as the manager is not to become involved with resolving personal issues, but you want to make them aware of resources the organization has available for them as an employee. It's also possible the employee may be having a personal issue they do not wish to discuss. You can let them know if a personal issue is a factor, they do not need to tell you about it, but the organization offers resources that may prove helpful to them. Be sure to document the resources you discuss with them as well as other aspects of your meeting. The About Professional Support pages in your workbook provide more information about resources available to you and your employees. Document the resources you discuss.

Meeting To Discuss Performance Concerns

After the Meeting

1. Follow up.

2. Encourage and reinforce.

3. Follow through.

1. Follow up.

Schedule frequent, regular meetings to check the employee's progress. Give regular and useful feedback — both positive and constructive — on the progress. Acknowledge positive change and improvements. If there are no improvements, work with the employee to identify road blocks as soon as possible so improvements can be achieved in the designated time frame.

2. Encourage and reinforce.

- When the employee's performance does improve, acknowledge it.

- Be sure to make time to talk to employees about positive topics so meetings with you do not always have a negative focus on a problem.

3. Follow through.

If improvement does not occur, you may have to proceed with disciplinary steps. As a manager, you must be willing to follow through with the consequences you outlined if the poor performance continues. If not, any future meetings with the employee will be compromised. Document continuing performance concerns and discuss the situation with Human Resources and possibly your legal department. If performance continues to be a concern, follow through with whatever disciplinary action is appropriate and consistent with company policy.

Be sure to maintain standards and do not ignore or minimize legitimate performance concerns. Lowering standards or making excuses can create problems for your other employees and your entire organization.

Meet with your employees regularly to discuss their performance so issues can be caught early and solutions to address them found as soon as possible.

How To Handle
Verbal and Physical Abuse

Follow your company's policy, if there is already one in place, for how to deal with verbally or physically abusive employees.

If you think you are dealing with a potentially volatile employee, one you think may pose a threat to yourself or others, you should immediately tell your manager and/or Human Resources Department. It is important to have a plan in place before meeting with the employee.

Know early warning signs of potentially threatening situations to ensure the safety of yourself and those around you.

There are four main steps to dealing with someone who may be verbally or physically abusive:

1. Call for help.
2. Stay calm.
3. Gain control.
4. Relax and de-stress.

Let's go over each step in detail.

How To Handle
Verbal and Physical Abuse

Step one: Call for help.

Involve your manager or supervisor and Human Resources as soon as possible. If you think it's necessary, call security or local authorities.

Report any threat or violent incident to a manager or supervisor immediately. Take all threats seriously, no matter how minor or farfetched they may seem.

Don't try to be a hero or take unnecessary chances. If it's safe to do so, walk away from the situation and get help. Never put your own safety in jeopardy.

Remember that it may not be possible to have a conversation with an irrational or potentially violent individual. Shift your focus from placating the person to defusing the immediate situation.

If you attempt to talk to the person and they become verbally abusive, follow your company's policy. Explain to the person that if the abusive language continues, you will stop the conversation.

Try verbal limit settings, for example:

*   "I'm not able to continue talking to you when you use that kind of language."

*   "Please, you will need to lower your voice to continue this conversation."

Step two: Stay calm.

While it may be a challenge, try to stay calm so you can stay alert and able to make appropriate decisions about what to say and do next.

Move slowly and talk slowly in a soothing tone.

Try to avoid an extreme reaction to the anger or threat. Deep breathing, counting or other relaxation techniques may help.

Step three: Gain control.

You can acknowledge the person's emotions and concerns by stating "It sounds like you are very upset with the situation …"

Take control of the conversation by adding, "I would like to help you. Please, let's keep this conversation on a professional level."

Step four: Relax and de-stress.

Dealing with an abusive person is stressful and the effects of stress can stay with you.

Take a few deep breaths, go for a short walk and give yourself and your co-workers some time to re-group.

About
Professional Support

You may consider seeking professional support if you experience any of the following:

- Sleep problems.

- Performance issues at work.

- Relationship difficulties with family or friends.

- Loss of interest in hobbies you normally enjoy.

- Lack of care about normal everyday work tasks.

- Excessive anxiety or worrying more than normal.

- Feeling overwhelmed or sad for more than two weeks.

- A noticeable change in appetite, eating too little or too much.

- Behavior and coping methods have become harmful to yourself or others, whether that is through aggressive behavior or unhealthy habits, such as drinking too much alcohol or taking drugs.

- Thoughts of harm to self and/or others.

Keep in mind some of these conditions may warrant more urgent professional help and you should seek support if you are unsure.

Your Employee Assistance Program (EAP) is available to all employees and their covered dependents and may include some free counseling sessions per issue, per year. Please check with your employer or your health plan for details.

Citations
American Psychological Association: How to choose a psychologist.
http://www.apa.org/helpcenter/choose-therapist.aspx.
Helpguide.org: Depression Symptoms and Warning Signs.
https://www.helpguide.org/articles/depression/depression-symptoms-and-warning-signs.htm.
Helpguide.org: Suicide Prevention.
https://www.helpguide.org/articles/suicide-prevention/suicide-prevention.htm.

Appendix A:
Performance Concerns Worksheet

Complete the "Addressing Performance Concerns Worksheet" using a current problem you are experiencing with an employee.

Appendix A:
Performance Concerns Worksheet

Based on the information we discussed today, please fill out this worksheet with a specific situation in mind.

1. Identify a current performance issue you'd like to address with an employee.

2. What steps will you take before approaching the employee?

3. How will you structure the confrontation?

4. What outcome do you want?

5. What problems do you anticipate?

6. How will you overcome those problems?

The case studies provide additional opportunities to discuss the topic as time allows.

A. You supervise a group of six employees, all female. Recently you hired another employee, Graham. All the employees are good performers. The women have a history of taking their coffee breaks and lunch breaks together. They also socialize off the job. Whenever a birthday or anniversary rolls around, they celebrate the occasion with a cake and cards at lunch or coffee.

Today, two of the women came to you and stated that they were having difficulty working with Graham. They said he didn't join them for lunch or coffee, refused all social invitations, and when they got him a birthday cake, he refused to join in the celebration. They also said that he wouldn't acknowledge any conversational gesture, not even "good morning."

How do you handle this situation?

B. Barry reports to you. He's more than 100 pounds over the weight recommended for his height. He's been seeing his physician for hypertension, high cholesterol and an irregular heart beat. Barry always has quantities of junk food at his desk and in his car which he consumes throughout the day.

Over the last two months, Barry has been found sleeping, several times, at his work station or in his car.

When you confront Barry, he responds that his medical problems caused him to fall asleep.

What do you do?

C. Rita is the receptionist for your company. Nancy, a valued customer, smiled at Rita and said, "Have a nice day," as Nancy left the building. Rita replied, "I will if you don't come back."

What do you do?

D. Eugene has worked for you for four years. During that time he has been a good performer and has been able to get along well with his co-workers.

Recently, there have been some organizational changes and layoffs that have affected your department. Since the organizational restructuring you have noticed that Eugene has been moody, short-tempered and unable to keep up with the day's work assignments. He has also been overheard complaining about the organizational changes and resenting the resulting layoffs.

You decide to discuss the performance problems with Eugene. Before you finish sharing your concerns, he interrupts. He states that he has too much to do and not enough time in which to do it. He says that your expectations are unrealistic and that the department could not accomplish the same amount of work which was previously completed with more people.

What would you do next?

E. Tim has been with the company for four years. You have been his supervisor for the last year and a half. Tim has had good performance reviews and is well-liked. Your company has grown dramatically in the last two years. It has become routine for employees to work long hours and some weekends. Tim is finishing his doctoral program, is getting married and is busy making wedding plans with his fiancée. In addition, his father is very ill. Tim comes in to work on time, works very hard and leaves after an eight-hour day. Another employee has complained to you that Tim is not being "professional."

What would you do?

A. What are the performance concerns? Because lunch and coffee are usually considered personal time, Graham does have the option of refusing those invitations. However, he is expected to use common courtesy — when someone greets him, he's expected to respond. A discussion with him around common courtesies might be appropriate. The supervisor might also inquire about any problems he may be having with co-workers that could be creating communication problems. Because the female employees appear to be hurt by his behavior, the supervisor may need to meet with them to discuss differing social needs. Explain that Graham has the right to refuse social invitations, but everyone is expected to treat each other with courtesy. The supervisor might also ask how this situation is affecting work relationships.

B. What are the performance concerns? Refer to the questions listed in "Eight Questions to Decide on Actions."

C. What disciplinary action would be appropriate? What would you do if Rita made the comment to a contractor or vendor? Another employee?

D. What are the performance concerns? This is a case where the problem is an organizational one, not an employee one. A manager in this situation may be tempted to be defensive. Keep in mind the importance of remaining objective and hearing the problem from Eugene's point of view. Discuss options for addressing the organizational problems and maintaining realistic expectations for employee performance.

E. What are the performance concerns? Is disciplinary action appropriate? How would you manage two employees making different choices for balancing their work and home lives?

Citations

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