

Performance/conduct management meeting – planning guide

Instructions

This guide can be utilised by managers when there is a requirement to undertake a performance or conduct related meeting with a worker.

It can be used as part of a process that results in a warning, remembering that all warnings (serious or minor) are verbally provided, need to be given after considering all information and responses from the employee, and need to be confirmed in writing after the meeting has occurred.

Members should consider this as a planning guide only. Customisation to suit the specific situation may be required. Before using or implementing this guide, please ensure it is consistent with any enterprise agreement, contract of employment, existing workplace policies, or Award terms which apply to the employees in your workplace.

Employee name:	Manager name:
Subject summary:	Date of meeting:

Background information

(include a bullet pointed synopsis of behaviour, issues, occurrences, dates, evidence or examples, previous warnings, and other basically relevant information to be discussed during a performance related meeting)

Follow the steps below when planning a related meeting with your employee

Step 1 – Describe the performance/conduct and its impact on the business and others	
<p>Show respect for the employee</p> <p>Use “I” statements and avoid saying “You”</p> <p>Be specific</p> <p>Be sincere and show concern</p>	<p>Plan your discussion:</p> <ul style="list-style-type: none"> • <p>Consider:</p> <p><i>“I hear/see.....”</i></p> <p><i>“I am concerned that.....”</i></p> <p><i>“As I see it, this will affect us because.....”</i></p>

Step 2 – Give the employee an opportunity to respond and give their input to resolve the issues

Show respect for the employee

Emphasise the need to solve the problem

Plan your discussion:

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Consider:

“I’d really like your help in solving this problem”

“How do you see the situation?”

(If this is a follow-up discussion, be sure to explain the consequences for the employee if the performance issue is not satisfactorily resolved - further disciplinary action, possible termination of employment)

Step 3 – Discuss the causes of the conduct or performance issues

Establish open two-way communication

Show respect for the employee

Use open ended questions – “what”, “how”, “when”

Be patient but persistent

Use active listening

Plan your discussion:

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Consider:

“What do you think are the causes?”

(If the poor conduct or performance is of a significant nature, it may be required to determine whether a warning will be given to the employee after this step. At this point ask the employee to step out of the meeting to consider)

Step 4 – Develop possible solutions

Ask for the employee’s solutions first

Provide constructive and supportive feedback

Draft solutions

Plan your discussion:

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Consider:

“That idea sounds good, what other solutions could there be?”

(Immediate and sustained improvement would be an essential)

Step 5 – Develop an agreed action plan

Identify the most likely solution(s)

Confirm actions the employee must take

Put a timeline in place
Identify help that you will provide

Confirm the employee understands and accepts the plan

Express confidence in the employee's ability to fulfil the plan

Plan your discussion:

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Consider:

“Let’s agree on an action plan”

*(Draft the action plan into a letter confirming the details of the meeting, and provide a copy to the employee **after** the meeting)*

Step 6 – Agree upon a review date

Suggest an appropriate time and date for a progress meeting (this may be ongoing until standard of improvement reached and sustained)

Diarise the date, and confirm it with the employee

Set up a reminder

Plan your discussion:

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Consider:

“Let’s set down a progress meeting for [date] at [time]”

Remember to keep a copy of your meeting notes for later reference, and provide a letter confirming the outcomes of the meeting, including if a warning was given during the meeting.