



5 STEPS TOWARDS BUILDING AN EFFECTIVE PERFORMANCE IMPROVEMENT PLAN

A GUIDE FOR YOUR LINE MANAGERS





INTRODUCTION

Dealing with poor performance is probably one of the biggest challenges your line managers will face.

When there's a host of other urgent tasks competing for your attention, it's tempting to brush the problem under the carpet and hope it will go away.

There are consequences, however, when walking away from those difficult conversations you'd rather not have. The employee continues to make mistakes, deadlines are missed, clients complain – and other members of the team start to feel resentful about constantly having to pick up the slack and put work right.

One of the best ways to tackle under performance is to sit down with the employee and put together a clear Performance Improvement Plan (or PIP).

So, what should be included in the plan, and what's the best way to go about it? This guide will help your line managers build more effective PIPs, and get that all-important employee buy-in.





1. IDENTIFY ANY UNDERLYING PROBLEMS

Before your managers start to put a performance improvement plan together, make sure they're fully aware of any issues which may be behind poor performance.

They may want to consider:

- Is the employee struggling because they haven't been given the training they need to do the job?
- Are colleagues being unpleasant or uncooperative?
- Are there personal or family issues getting in the way of their ability to focus?

Be aware that employees are not always up-front about any health or [disability issues](#) they may be grappling with for fear they might lose their job.

If you have an HR platform, have your managers look back at the history of absences, training and performance reviews. For example, are there any patterns or trends, such as missed training opportunities, poor performance reviews or increasing level of sick leave that could point to an underlying problem with motivation or work-life balance? Making use of your employee data to identify potential issues *before* you have the conversation will help you to ask the right questions.

Make sure they've got to the real root of the problem. If they don't uncover any hidden issues, they won't be able to give the employee the support they need or make any necessary adjustments to their role and nothing is likely to change.

2. INVOLVE THE EMPLOYEE

People are much more likely to buy in enthusiastically to any performance improvement plan if they have played a part in putting it together. So, make sure your managers sit down with the employee and have a frank discussion about their concerns and what needs to change.

Your managers will need to ensure it's a dialogue, not a diatribe.

Employees should have the opportunity to add their perspective, and your managers should be open to any ideas they may have about what they need to get their performance to an acceptable level.

Firm but friendly is the tone to aim for during these initial

discussions. People need to be under no illusions about the fact their work or attitude is lacking - but they equally need to feel you have a genuine desire to help them get better and will support them in whatever way necessary.

Your managers should think carefully about whether or not to involve HR at this stage.

Having you sit in on the performance conversation may appear heavy-handed and might inhibit an open discussion - but it's always a good idea at this stage to let you know that you are having the conversation, and what it's about, so they can flag up any potential issues.





3. SET CLEAR OBJECTIVES

A set of clear objectives should be at the heart of any performance improvement plan. The employee needs to be crystal clear about exactly what you want them to do differently, by when, and how this will be reviewed or measured.

Make sure any objectives or targets you set are realistic and to be performed within an appropriate time frame.

People will feel defeated before they start if what you are asking is so stretching that it seems unachievable.

Try breaking objectives down into small steps or chunks and have regular informal check-ins. That way, people can see themselves making progress and will also have regular opportunities to discuss any issues or obstacles they may be experiencing along the way.

Keep clear records, ideally an HRIS or another system that both you, your manager and the employee can access. This means if the issue escalates at a later date, you can demonstrate the employee has been given a fair chance to improve, and have the evidence to support your decisions.



4. AGREE TRAINING AND SUPPORT

Lack of appropriate skills can be at the root of poor performance.

Sometimes people have been thrown in at the deep end from day one of their job and have been left to muddle their way through tasks they are not properly equipped to handle. Or, maybe their role has changed and they are now being asked to handle new work or operate in areas they are not familiar with.

In those situations, training and development should be an integral part of the performance improvement plan. So, Once you and your manager have identified skill or knowledge gaps, you can think about the best way to plug them.

That doesn't always have to involve sending people on a formal training course - although there will be times when this is exactly what they need.

Sometimes, job-shadowing a colleague can be an effective way to build understanding and capability. Or, you could consider assigning a mentor who could guide the employee on the best way to handle tasks or situations.

Any training that's agreed should be clearly documented on the plan, and it's vital to make sure it actually happens.

You can't call people out for poor performance if you're not helping them develop the skills they need to do their job properly.



5. REVIEW PROGRESS REGULARLY

Set regular dates when your manager and the employee can sit down to review and document progress. At this stage, record-keeping is essential.

Should performance not improve and it'd decided, for example, to take disciplinary action, having a clear trail of what was discussed and agreed will be important. This gives the individual a target to work towards and gives you the opportunity to make sure what's been agreed is actually happening and everything is staying on track.

HR management systems that provide online check-ins, make keeping track of conversations really straight-forward, and ensures important documentation doesn't go astray.

In most cases, having clear goals and a plan of action will result in improved performance. People generally want to do a good job and please their manager. But, if nothing has improved, you may need to take things to the next level.

Make sure your company's disciplinary process are totally clear with the steps needed to follow, and that the employee is also clear you are moving into a formal process. Your manager should seek support from you in HR at this stage, and make sure that all relevant policies, processes and notes of meetings are available to everyone involved. This means that everything is visible, there is no room for misunderstandings and should the employee raise a formal grievance, you will be able to demonstrate that you have handled the issue fairly and appropriately.



FURTHER READING

The following articles look at all aspects of effective performance management - why not take a look?



How to manage difficult conversations: 8 top tips

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Performance management: are your processes fit for purpose?

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