



Getting Performance or Behaviour Back On Track - Conversation Plan

Use this template to prepare for and run this conversation. Modify the language to suit your personal style but cover all the steps and content listed.

1. "I believe **there is an issue with your performance / behaviour that is affecting the business and which we need to discuss and resolve**. It's not at the point where I'm considering formal discipline but in my view it needs to be addressed".
2. **"Let me describe what I see as the issue(s)**. (Be specific with facts, times, dates, numbers, link to their agreed responsibilities, KPIs, Code of Conduct etc).

The facts are

The impact on the business is
3. **"If we don't get back on track here then** (outline consequences of not fixing the issue; e.g. poor performance appraisal, impact on salary review, loss of respect among the team, promotion prospects, perhaps disciplinary action)
4. **"What's your response to what I'm saying?"** (explore causes, explanations etc) Note: If you conclude at this point it's more of a 'Won't Do' as opposed to 'Can't Do' problem i.e. you're satisfied there are no external factors preventing the performance then consider changing tack and dealing with it as a disciplinary matter. [See Disciplinary Process]. Adjourn to prepare for a Disciplinary Process. Before adjourning advise the employee; this is now a disciplinary process, what the consequences may be, that you will further investigate using the disciplinary process, that they will have a chance to fully respond before any decisions on discipline are made and that they have the right to representation. Adjourn while they consider this change and decide whether to be represented. If you don't believe a formal disciplinary process is required proceed as follows].
5. **"Can we agree you need to get back on track?"**
6. **"How do you suggest you'll do that?"** (Ask for their solutions first. Be insistent a workable solution is found)
7. **"Let's agree an action plan** (Agree the most likely solution. Be sure they understand/accept the plan. Note any help they need. Document the plan).
9. **"Let's agree to follow-up"** (note when you'll meet to track progress)
10. **"Do I have your commitment to the plan and getting back on track?"**

"I'm confident you can get back on track and I look forward to that. Thanks"