

**A sample activity from the  
Fenman trainer's resource:**

# **Managing the Poor Performer**

Written by Arthur Proud

Thank you for downloading this sample activity. You are welcome to use this material in your courses.

This sample activity is just one of 19 contained in the trainer's activity pack 'Managing the Poor Performer', published by Fenman. Details of the other activities are given at the end of this document.

# Managing the Poor Performer

## Contents:

Introduction

Full contents listing: 18 activities

About this resource

Activity 1: Dealing with a newcomer's poor performance

## Introduction:

*Managing the Poor Performer* provides masses of **practical support** and **proven tools, techniques and skills** to give your managers the confidence and ability to deal with poor performers in your organisation.

This new training manual will equip your managers with the skills to quickly spot changes in behaviour and performance, and identify the reasons behind these changes. Causes of poor performance are broken down into a framework in terms of willingness to work, and ability to perform required tasks. This framework enables your managers to objectively assess the under-performer, and identify steps to improve performance.

Part One of this resource provides 10 activities, outlining the processes involved in addressing different types of poor-performer situations. Simply tap into the exercises which are most relevant to your managers, such as dealing with:

- a sudden fall in performance
- the 'no improvement' review
- the 'bolshie' employee
- the high-performer who isn't meeting objectives

Part Two gives you 8 ready-to-run activities that deal with the skills required to confidently address the poor performance issues, without demoralising or antagonising the individual concerned. To name just a few, you'll find activities that address:

- hiding your own opinion of the poor performer
- listening properly to the person
- setting improvement targets
- making action reports

Throughout these exercises, your managers will learn to apply proven trainer's tools, such as the poor performer discussion planner, a 6 step approach to handling a recent change in performance, and a Guiding Principle Statement List – advice on things to say, and how to say them. These tools will provide your managers with invaluable support and reminders back in the workplace.

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## **PART ONE: SITUATIONS AND PROCESSES**

- 1. Dealing with a newcomer's poor performance**  
Uses role-play and the coaching matrix to identify the part management plays in the under-performance of a new member of the workgroup.
- 2. Dealing with the slightly below-average employee**  
Examines the reasons for the neglect of these poor performers and provides effective behaviours for managers to use for improvement.
- 3. Dealing with a sudden fall in performance**  
Highlights the importance of dealing with feelings, and provides a skill practice in which participants use a six-step approach to handling personal issues affecting performance.
- 4. Dealing with the 'no improvement' review**  
What if all your best efforts result in no improvement? Through group discussions and casework, this activity builds on information provided by you to ensure the 'no improvement' poor performer is involved in improvement targets and aware of the consequences of non-achievement.

**5. Dealing with the 'bolshie' employee**

Participants look for the positive aspects of 'bolshie' behaviour and work on an agenda for dealing with it. The case of Joe Higgins provides them with a difficult individual to work on.

**6. Dealing with the aggressive player**

Dealing with aggression is always intimidating; this activity provides some general rules to follow in dealing with it. Aggressive behaviours are examined in terms of dominance and care, and specific behaviours for calming different types of aggressor are set out.

**7. Dealing with the high performer who is not meeting objectives**

'High-flyers' often don't perform well at what they consider to be work that is 'beneath them'. Greater involvement is often the answer, and this activity provides the 'high-flyer development process' that will ensure both involvement in high-level activity as well as commitment to low-level tasks.

**8. Dealing with the apathetic employee**

This activity divides the apathetic poor performers into two groups: the 'No' people who say 'no', 'can't' and 'shan't' to everything, and the 'whiners and groaners'. Methods of dealing with each of these are brought out.

**9. Dealing with the emotional employee**

Handling poor performers often leads to an emotional outburst from them. In this activity, in two separate role-plays, participants learn the underlying principles of dealing with emotion in others and adopt a carefully structured process with which to engage the individual.

**10. Dealing with the 'know-all' who contributes little**

The individual's need for self-worth is examined and related to their performance level. Participants then generate a six-step process to use in improving the individual's sense of self-worth.

## **PART TWO: THE PERSONAL APPROACH AND THE KEY SKILLS**

### **11. Analysing the causes of poor performance**

Provides work-based practice at using an analytical model for categorising poor performance in terms of willingness and ability.

### **12. Listening properly to the person**

Provides participants with the key skill of performance improvement, that of listening to the poor performer on three levels.

### **13. Hiding your own opinion**

Keeping one's opinion to oneself is crucial in avoiding a personality focus when dealing with poor performers. In this activity the participants practise concealing their opinion whilst discussing controversial issues.

### **14. Key aspects of working with the poor performer**

Provides a generic set of principles and processes for dealing with any type of poor performer.

### **15. Setting improvement targets for the poor performer**

Poor-performer objectives are different from those set for others. As well as being specific and time-related, they need to be seen by others as acceptable and not letting the individual 'get away with it'. Because of the individual's past record, these objectives must be 'internalised' by the poor performer. Four case studies provide a focus and practice for setting poor-performer objectives.

### **16. Giving feedback on poor performance**

Giving feedback can make things worse! This activity focuses on giving feedback in an empathetic manner, and asks participants to choose an empathetic response from a number of alternatives.

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**17. Making action reports on poor performance**

Using a meeting planner produced by members of the group and a meeting summary document, participants conduct a piece of theatre.

**18. Customising your approach**

Participants learn about the different personality traits in individuals. They practise recognising these in each other and then, in discussion pairs, formulate the most effective ways of bringing about performance improvement with a particular individual.

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# About this resource

This Trainer's Activity Pack is for use in training managers, supervisors and anyone with responsibilities for other people's performance to manage poor performance in the workplace. It contains 18 stand-alone training activities.

The pack comes in two parts:

**Part One** outlines the *processes* involved in dealing with poor performers. It provides ten activities, each one targeting a different type of poor-performer situation.

**Part Two** provides a conceptual approach to poor performance and provides, in Activity 11, an analytical framework for considering poor performance. It deals with the skills required to handle poor performers in general, beginning with the primary skill of hiding one's own opinion of the poor performer. It goes on to describe the key aspects of working with poor performers. Further activities enable managers – your course participants – to assess their helping style.

Let's emphasise straight away that these are all stand-alone activities. They can be used separately as individual training sessions, most lasting only about an hour, and can easily be delivered in the workplace. This means that, as a trainer, you can make a significant impact without all the difficulties about people being released for training. Equally, the activities can be used separately or together as part of a training course on general aspects of management and work, or linked together to form a training course based around the idea of poor performance.

Whatever you choose to do, you will find that each activity provides everything you need to run it successfully without being railroaded into making set speeches or repeating, parrot fashion, the processes laid down. General guidelines about what to say and what to expect in return are given, but you are free to use your own words and phrases.



# Activity 1

## Dealing with a newcomer's poor performance

### Purpose

To use role-play and a coaching matrix to identify the part management plays in the under-performance of a new member of the workgroup; to enable participants to discuss solutions to the role-play situation and provide preventative measures that can be undertaken with newcomers.

FOR PREVIEW ONLY

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# Activity 1

## Dealing with a newcomer's poor performance

### Introduction

When a new member is recruited to the team or workgroup, it is only natural that we expect them to perform well; after all, they have just been through all those recruitment tests and interviews. So, we just 'leave them to it', and, later, say after a couple of months, when their performance is not what we expected, we blame *them*. But it is nearly always *our* fault or, more likely, the manager's.

New people need looking after. They need careful introductions to 'the way we do things around here', to the things we hold dear, to our values, our style, our 'culture'. Above all they need training in the particular way their job should be handled. They need to have clear objectives and standards that must be achieved, and they need to know what constraints will be applied if these standards are not met.

### Purpose

To use role-play and a coaching matrix to identify the part management plays in the under-performance of a new member of the workgroup; to enable participants to discuss solutions to the role-play situation and provide preventative measures that can be undertaken with newcomers.

### Applications

- Managing the poor performer.
- Induction and recruitment.
- First-line management.

### What happens

The activity opens with the participants considering the neglected newcomer who, because of the neglect, starts to underperform. They then perform a role-play. The role-play is a monologue by a volunteer that a newcomer might make about their

situation at work, with a few other participants in a supporting role. The rest of the participants take notes during the monologue and then divide into two groups, one of which decides how the situation could have been prevented, the other how to take the situation forward.

These groups then present their findings and look at how to set about choosing a way forward in terms of the need for training or coaching or the setting of objectives.

This leads on to a discussion about different approaches to fulfilling a training need, and how to take things forward from the present situation by identifying the most appropriate technique from training, counselling, coaching or teaching.

A brief summary emphasising three key points closes the activity.

## Time

Overall time required: 1 hour 40 minutes

- Introduction: 10 minutes
- Terry's tea break: 35 minutes
- Situation analysis: 30 minutes
- Which training approach? 10 minutes
- Perceptions of behaviour: 10 minutes
- Summary: 5 minutes

## Materials & resources

- 2 OHT masters:
  - 1.1 *The training approach identification chart*
  - 1.2 *The coaching matrix*
- 3 Handout masters:
  - 1.3 *Terry's tea break*
  - 1.4 *The training approach identification chart*
  - 1.5 *The coaching matrix*
- Overhead projector and screen
- Flipchart and stand or whiteboard
- Marker pens for trainer
- Flipchart paper and marker pens for participants
- Paper and pens for participants

## In preparation

- Wall, screens or whiteboard for displaying flipchart pages
- Tape, Blu-Tack® or pins
- Space for small-group work

Familiarise yourself with the detail of Handout 1.3 Terry's tea break, role-play brief by reading through it two or three times. Play it out by yourself, and then think what actions would have been needed to prevent this happening to you. Ask yourself what a manager could do now to retrieve the situation. At best, your preparation should enable you to answer the questions that you will be putting to the participants.

## How do I do it?

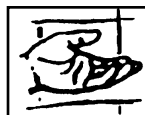
### INTRODUCTION

Open the activity by saying that one class of poor performer that is sometimes neglected until it is too late is that of the individual who joins the organisation in high hopes and then, after three or four months, starts to underperform.

Discuss with the participants for about 10 minutes how newcomers are introduced into their organisation.

Now say that you are going to ask them to role-play the situation of a new entrant to the organisation.

### TERRY'S TEA BREAK



#### Distribute Handout 1.3

*Terry's tea break*

Take about 10 minutes to set up the role-play.

Ask for a volunteer to play the part of a newcomer who has underperformed over the three or four months they have been with the organisation.

Explain that the role-play is a 'gripe session' during a tea break just before the newcomer goes to see the manager about their poor performance.

Try to arrange it so that your 'volunteer' is an outgoing person who will build effectively on the brief. It may be that one of your participants has revealed a 'gripe' about their entry into the company, in which case they might be ideal for the role of Terry.

Ask for another four or five volunteers to play the other people at the tea table – they are not necessarily all from Terry's workgroup, but some are.

Mention that Terry's role is a solo one, even though five or six people are on stage. The people at tea with Terry should respond only briefly to the moans, but nod agreement and show an underlying indifference. The rest of the participants remain silent and take notes about Terry's attitude, his feelings and the words he uses. As your volunteer gets well into the role, it is worth them observing the body language.

Provide all the participants with paper and pencils.

Seat the 'tea break' people in front of the participants and ask everyone to read the brief. Allow a few minutes for this.

Remind the other tea-table players that they should make only brief responses to Terry's outburst, not interrupt but nod or murmur assent or dissent. (If you don't emphasise this, they may start contributing!) Tell them to imagine that this really is happening at a tea break and they should respond as they would in real life, but silently.

Tell the rest of the participants that their role is as observers, and that during the role-play they should be looking at:

- Terry's attitude
- what has made Terry like this
- the *actual words* Terry is using that support your view of his attitude
- his body language
- his effect on the rest of the tea table.

Now run the role-play for about 20 minutes.

When the role-play is finished, lead a short round of applause. This will help to bring 'Terry' out of his role. Give an additional debrief, because your actor may have become deeply involved as 'Terry', by asking how they felt as Terry. Accept the player's answer and ask all the players to return to the main body of the group.

## SITUATION ANALYSIS

Divide the participants into two groups: Group A and Group B.

Ask Group A to take 15 minutes to prepare a 5 minute presentation to the whole group about the steps that should have been taken that would have prevented Terry's situation arising.

Ask Group B to take 15 minutes to prepare a 5 minute presentation on the steps that should be taken *now* to remedy the situation.

Ask each group to choose a spokesperson to present their conclusions in the plenary session.

Send one group off to another room with a supply of flipchart paper and marker pens, and leave the other group in the main room similarly equipped.

Leave the groups alone for about 12 minutes, then visit each one and remind them they have 3 minutes to complete their presentations.

At the end of the time, recall them into a plenary session.

Each group has 5 minutes for their presentation. Allow about 15 minutes in total for this feedback.

Ask Group A first to present how the situation could have been avoided. Focus on four key areas which, if not mentioned by the group, should be proposed by you. These are:

- An initial briefing by the manager on the objectives that should be achieved over the next three months – these should not be excessively challenging, and should be chiefly concerned with familiarisation with the organisation.
- Continuing 'shepherding' by the manager on a weekly basis.
- The appointment of a 'minder' or 'godperson' like the traditional godmother/godfather role, from amongst the workgroup, whose job it is to introduce the newcomer to other people and departments and who will be the first port of call in identifying what to do when the newcomer is uncertain, for example, in the time-off issue in the role-play.
- A formal interview with the manager after four or five weeks to identify whether to use a training/coaching/counselling/mentoring approach.

Spend a few minutes making these points and writing key phrases on the flipchart so the participants can note them down.

Now move on to Group B's presentation about how to remedy the existing situation.

Receive the presentation and expect to get responses that are more to do with what *should have been done* rather than what to do now. Some of the responses you are likely to get are these:

- **Exit this person and start again.**  
This is wasteful; in any case, unless the processes are in place the same thing will happen again.
- **Provide the necessary training now.**  
This is part of the answer, but how is the individual going to feel about it? Might they feel that you are doing a 'catching up' exercise for your own (rather than their) benefit?



- **Talk to the individual about the need for improvement.**

Not a good thing to do. You would be making this person the scapegoat for *your* failings.

- **Say you are sorry things have turned out like this.**

This *could* be part of the answer as long as it wasn't the previous one in disguise!

- **Provide a combination of coaching and training.**


This is probably the best answer, but it needs an additional element – the individual should be given the opportunity to air all their grievances to the manager and the manager needs to accept them without reservation. This means adopting a counselling role in which the manager listens without judging and *then* expresses regret for what has happened.


At this stage the offer can be made to attempt to redress the situation by a combination of training and coaching, with the manager adopting, temporarily, the role of mentor. This mentor role should be seen as lasting for no more than a couple of weeks, at which time a mentor could be appointed from outside the line responsibility area.

Write any points the participants may have missed on the flipchart.

Emphasise to the participants that how their actions are perceived by the individual depends on how the *individual* sees the team and the organisation.

## WHICH TRAINING APPROACH?

	<p><b>Show OHT 1.1</b> <i>The training approach identification chart</i></p>
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	<p><b>Distribute Handout 1.4</b> <i>The training approach identification chart</i></p>
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At this point introduce Handout 1.4 The training approach identification chart, by showing OHT1.1 and going through the boxes one by one with the participants. Use the brief and notes below for this.

Start by saying that identifying the need for a particular type of approach to developing the individual is different from identifying a specific training need. Ask the participants to imagine helping someone to learn to change a wheel on a car: some people will respond best by trying to do it themselves whilst the 'teacher' stands back offering encouragement, others will want to be given specific instructions, some won't want to do it at all and may need to be confronted with the consequences of a motorway breakdown!

Now explain the boxes:

- **Box 1** is a category in which the individual is very good at the task and possesses a high willingness to learn.

It seems that these people can safely be left to their own devices, but this is not so. They have a need for development and training just like everyone else. These people – newcomers to the organisation – need mentoring, they need a 'godperson' to help them get along with the organisation's peculiarities. Because they are so capable, they need gentle restraint from trying to change age-old practices all at once. This can be done by setting them challenging objectives quite early on in their career in the organisation. Appointing a mentor who is senior to them will raise their self-esteem as well as giving them valuable insights into the organisation from a different perspective.


- **Box 2** people have a totally different need. They just can't do the job. Perhaps it's very different from what they are used to – like using a new software package for example. The way forward here is simply to train, to teach them how to do the task. But don't just leave it at that; make sure there is a continuing level of coaching until the


person is very confident, so confident that now you would class them as 'Box 1'.

- **Box 3** holds people who can already do the task but seem unwilling to learn about the wider aspects of the job. They don't seem interested in new methods or the organisation. Often this is a defence against seeming unknowledgeable to other people. Placing them in a coaching environment can make learning a way into acceptance of them by other members of the team.
- **Box 4** is the difficult one. People here seem to have slipped through the net of the recruitment process; somehow we feel that they shouldn't be here at all. That may be the case. Perhaps they 'over-performed' at interview but even if they did, they are here now and must be dealt with. The way forward is to teach them the task and to provide a *vision* of what life could be like if learning objectives are pursued. And, importantly, these learning objectives are not necessarily ones solely to do with work; if people get the 'learning habit', then they transfer this habit to all areas of their life.

Explaining the identification of a training approach should take about 10 minutes.

## PERCEPTIONS OF BEHAVIOUR

	<p><b>Show OHT 1.2</b> <i>The coaching matrix</i></p>
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	<p><b>Distribute Handout 1.5</b> <i>The coaching matrix</i></p>
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Show OHT 1.2 The coaching matrix, and explain that it is an **indicative device**. It indicates, and gives a warning about, how your actions will be perceived by a newcomer to the organisation. Being honest about yourself and the organisation

will help you to avoid some of the worst behaviours that can surface with a newcomer.

Recognising the way in which the newcomer sees the environment will help you to make allowances in the way you handle meetings with them. Explain to the participants that all our actions are seen in the context of the environment we live and work in. So, for example, in France male politicians commonly kiss each other on both cheeks; one can imagine the effect caused by the UK Prime Minister and the Leader of the Opposition behaving in a similar fashion! At work our actions are interpreted in the light of a long-established culture, and the newcomer quickly learns to recognise the symptoms of this culture.

Point out to the participants the two left-hand boxes and explain that words that are seen in a coaching environment as encouraging (shown in the top box) may, in the wrong environment, be seen as patronising (as in the lower box), which will mean that your encouragement will have to be given one small step at a time.

Similarly, looking at the right-hand boxes, words that in a coaching environment are seen as 'problem-solving' may, in the wrong environment, be seen as judgemental and critical. This means that in a 'reasoning' situation you may have to prove your willingness to work together by adopting the other person's solution *that you may see as incorrect* – you will have to give them the opportunity to 'fail' and then *not* criticise them for it.

Now indicate the two right-hand boxes again and ask the participants how to mitigate the effect of their own behaviour towards the newcomer's poor performance when they are in disagreement. Lead the discussion towards the adoption of a non-critical attitude where the roots of the disagreement are sought *from the newcomer*.

Ask them to consider similarly the case of agreeing with the newcomer where a coaching climate doesn't exist. It is likely that they will see no difficulty with this box, after all, why should any difficulty arise where there is agreement?

Point out that in an environment where people are not naturally helpful, any agreement can too easily be seen as self-seeking ('Why should she help me?') or patronising.

In discussing the approach with the participants emphasise the need to avoid any effusiveness or superlatives. To say 'You are right' would be quite sufficient.

Tell the participants that Handout 1.5 The coaching matrix, is for them to keep as a reminder.

Allow about 10 minutes to explain and demonstrate the coaching matrix.

### SUMMARY

Take 5 minutes to summarise the activity yourself or ask the participants to do so. Emphasise these three key points in particular:

- poor performance in the newcomer is best avoided before it starts by adopting an approach that is appropriate to their needs and is a *continuing* one
- all actions are seen in the context of the working environment and culture
- it is the responsibility of the manager to ensure that the newcomer is coached through the early weeks in the organisation.

**FOR PREVIEW ONLY**



# The training approach identification chart

1.1

Willingness to learn	High	<b>Box 2</b> A newcomer who is very willing to learn but is unable to perform the task to the required standard.	<b>Box 1</b> A newcomer who is very willing to learn and can perform the task well.
	Low	<b>Box 4</b> A newcomer who is unable to perform the task to the required standard and seems unwilling to learn.	<b>Box 3</b> A newcomer who is able to perform the task well but seems unwilling to learn.
		Low	High

Ability at the task

FOR PREVIEW ONLY





# The coaching matrix

1.2

Where a helping, coaching environment exists,  
AGREEMENT between manager and subordinate is seen as

Encouraging

and DISAGREEMENT as

Reasoning

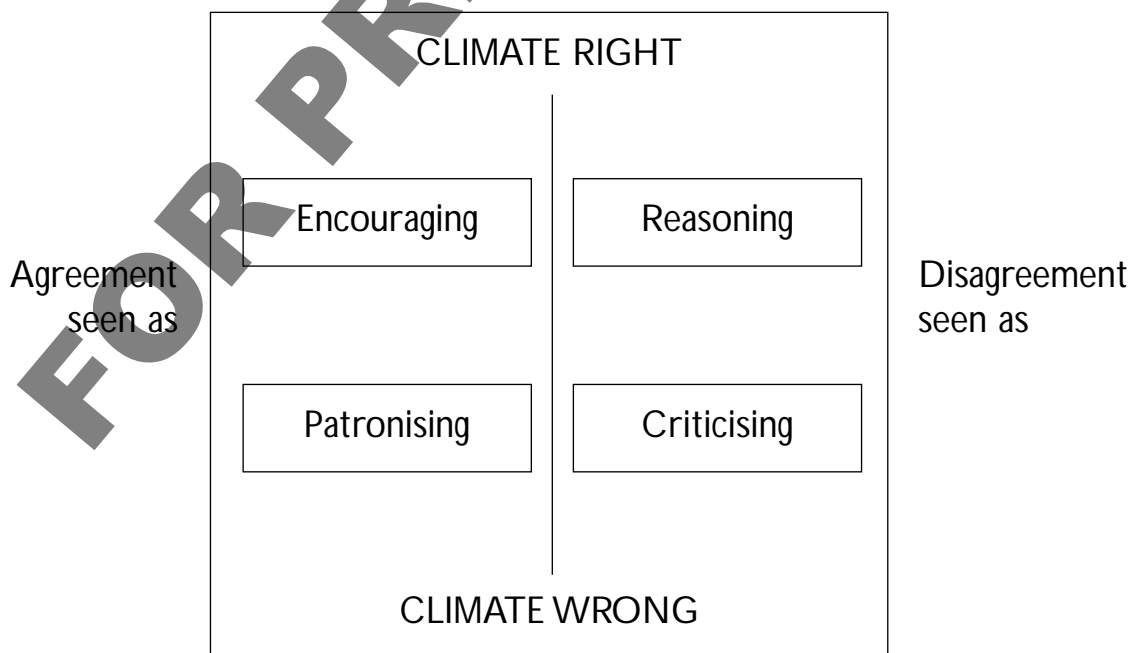
Where such an environment does not exist,  
AGREEMENT between manager and subordinate is often seen as

Patronising

and DISAGREEMENT as

Criticising

These four boxes form the coaching matrix:





# Terry's tea-break

1.3



1

You will have 20 minutes for this role-play.

## ROLE-PLAYER'S BRIEF

Try to approach your role as if this situation has happened to you and you are really fed up with it. You want to 'let off steam'. You feel let down, hard done by, neglected. Even if someone at tea agrees with you, you are unlikely to respond positively – you've had it up to here!

## TEA-TABLE PLAYERS' BRIEF

Your role is to make only very brief responses to Terry's outburst. Do not interrupt him or murmur assent or dissent, but nod or shake your head and show indifference to his moans. Imagine this is really happening at a tea break and respond as you would then, but silently.

## OBSERVER'S BRIEF

Your role is to take notes about Terry and the situation, but to remain silent. Look at and listen to the following:

- Terry's attitude
- what has made Terry like this
- the actual words he uses that support your view of his attitude
- his body language
- his effect on the others at the tea table.

Continued ...



1-15



# Terry's tea-break

... continued

1.3

## ABOUT TERRY

You joined the organisation about three months ago and, when you got the job, the personnel guy told you that you were far and away the best of the hundred or so applicants. This made you feel very good – here was a job you really knew how to do and it offered a great opportunity, your enthusiasm was really high. And when you got here the people were so friendly and you really liked them.

But your first few days weren't very good. You were left on your own and there were some aspects of the job that you didn't understand. Worse, when you asked one of the team, they didn't seem to understand your difficulty. But you persevered, and when you next saw your manager – the following week as she had been on holiday – you mentioned one or two of your difficulties. 'Oh, you'll get the hang of it', she'd said. But you didn't. In particular, one of the forms you have to use has twenty-five different fields all with initials which you don't understand. No wonder they delivered 1,800 10-litre drums instead of 1,800 litre bottles! Of course, everybody said, 'Oh it's not his fault, he's new here', but you could see they didn't like it, especially as two of the team had to work late repacking and loading the order.

The other thing is that nobody has told you what they expect you to do. You seem to be just a dogsbody doing what everyone tells you, and yet you were recruited to do a specific task – or so you thought.

As if that wasn't enough, yesterday you wanted two hours off to take your little boy to the clinic and were told that you had to give two days' notice. 'That's what we usually do', you were told. Well, you just went. You had to as there was nobody else who could take him. So now your manager is in a fit about it and wants to see you. Well, that'll make a change! You've only seen your manager twice since you've been here, and you've a good mind to suggest where to put their job! Still, let's have a cup of tea first.





# The training approach identification chart

1.4

Although the analysis of training needs is a complex process best done by a professional, the line manager can save time and trouble by identifying where a need for help and development exists and how, in general terms, to provide for it.

The training approach identification chart below uses the concepts of *ability* to do the task with the *willingness* of the individual to learn – to learn not only the skills to do the present task, but to adopt new methods.

Use the chart like this:

- Assess how well your individual is performing the task *they were employed to do*. This may not be the task they are actually being asked to perform.
- Assess how willing the individual seems to take instruction from others.
- Assess how well the individual seemed *at first* to learn the ways of the team.
- Now place them in one of the boxes.
- Bear in mind that people do not fall into boxes very easily, so try to assess *degrees* of ability and willingness to learn and judge in which box they belong accordingly in order to give you a closer appreciation of their needs.

Continued ...





# The training approach identification chart

... continued

1.4

<b>Willingness to learn</b>	<b>High</b>	<b>Box 2</b> A newcomer who is very willing to learn but is unable to perform the task to the required standard.	<b>Box 1</b> A newcomer who is very willing to learn and can perform the task well.
	<b>Low</b>	<b>Box 4</b> A newcomer who is unable to perform the task to the required standard and seems unwilling to learn.	<b>Box 3</b> A newcomer who is able to perform the task well but seems unwilling to learn.
		<b>Low</b>	<b>High</b>

**Ability at the task**





# The coaching matrix

1.5

Where a helping, coaching environment exists,  
AGREEMENT between manager and subordinate is seen as

Encouraging

and DISAGREEMENT as

Reasoning

Where such an environment does not exist,  
AGREEMENT between manager and subordinate is often seen as

Patronising

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Criticising

These four boxes form the coaching matrix:

