

ME-04 | Managing Underperformance

Sample assessment report

ILLUSTRATIVE FICTIONAL EXAMPLE

A practical view of how assessment responses can become a better-prepared performance conversation.

The situation at a glance

SITUATION	CONVERSATION AIM
A normally reliable team member has missed three weekly case updates in six weeks. The delays are affecting handovers and creating extra follow-up for colleagues.	Clarify the pattern, understand what is contributing to it, reset the expectation and agree practical support and review points.

FACTS preparation snapshot

F Facts Mostly clear	A Agreed expectations Clear	C Context and consequences Needs discussion	T Target improvement Emerging	S Support and next steps Partly clear
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What the responses suggest

- The manager can describe a pattern using dates and outputs rather than labels or assumptions.
- The expected weekly update is understood, but the employee's current understanding should still be checked.
- The impact is clear: disrupted handovers, repeated chasing and reduced confidence in follow-through.
- The missing information is the employee's perspective - workload, priorities, confidence, clarity or another barrier.
- The conversation should aim for improvement and support, not a verdict prepared in advance.

This report is a preparation aid. It is not a performance rating, a disciplinary finding or a substitute for fair organisational procedures.

Preparing the conversation

Evidence to bring

- Three missed weekly updates: 4, 18 and 25 September.
- Two handovers delayed while information was chased.
- The weekly update expectation was confirmed at the last team meeting.
- Previous overall performance has been reliable.

Assumptions to test

- Are priorities or workload unclear?
- Is there a skill, confidence or system issue?
- Does the employee understand the wider impact?
- What support would make consistent delivery realistic?

A possible opening

I want to talk about the weekly case updates. Three have been missed over the last six weeks, and that has delayed two handovers. I would like to understand what is getting in the way, then agree what needs to happen and what support would help.

Proposed improvement and review rhythm

WHEN	AGREEMENT	PURPOSE
Now	Confirm the weekly update, deadline and required information.	Create one clear standard.
Within 7 days	Check understanding, workload and any practical barriers.	Remove ambiguity and agree support.
At 30 days	Review consistency, impact and any further action needed.	Recognise progress or reset the plan.

THE HUMAN CHECK

Be clear about the concern and curious about the cause. Describe the pattern without exaggeration, listen before deciding, and leave the conversation with shared expectations, support and a review point.

Illustrative sample only. The scenario, dates and responses are fictional and are included to demonstrate the style and practical value of a Better Conversations report.