

Managing Underperformance

Performance Conversation Workbook



PURPOSE

Turn assessment responses into a fair, evidence-based conversation plan. The AI insight is a preparation prompt not a conclusion, diagnosis or formal finding.

PREPARED BY	Amy Body
EMPLOYEE	Direct Report
REVIEW PERIOD	1–2 weeks

YOUR PREPARATION ROUTE

F	A	C	T	S
Facts	Agreed expectations	Consequences & context	Target improvement	Support & next steps

Use the five pages that follow as preparation, not as a script. Check the wording, test assumptions and adapt the prompts to the conversation.

WHY THIS MATTERS Start with what can be observed and evidenced. This keeps the conversation specific, fair and less likely to become personal.

ASSESSMENT SUMMARY

WHAT WE ASKED

Where is the gap? Is it once-off or recurring? What examples support the concern? How confident are you that the concern is evidence-based?

WHAT YOU TOLD US

Recurring gaps in missed deadlines and follow-through. Examples include unanswered requests for PO numbers, shared-mailbox work not being monitored and invoices not being paid on time. Evidence confidence: 9/10.

COACH INSIGHT

◆ INTERPRETATION

The concern is well supported by specific examples and a recurring pattern. The strongest opening is not a label about the person, but a short sequence of observable examples, dates and the effect of the missed follow-through.

CONVERSATION PRIORITY

LOW 1 2 3 4 5 6 7 8 9 10 HIGH

Current position: 7/10

Why this rating? The evidence is strong, but the conversation still needs a small number of clear examples rather than a long list of frustrations.

STRENGTHS IDENTIFIED

- ✓ Specific work examples identified
- ✓ Recurring pattern recognised
- ✓ High evidence confidence: 9/10
- ✓ Concern can be described without labels

AREAS TO EXPLORE

- Which 2-3 examples best demonstrate the pattern?
- What dates, emails or work records support them?
- Is relevant work being completed elsewhere or through another route?
- What does the employee say is happening?

MANAGER PREPARATION SNAPSHOT

Select 2-3 examples. Note the date, expected action and actual outcome. Remove any wording that describes the person rather than the work.

A

AGREED EXPECTATIONS

What should be happening?

WHY THIS MATTERS Underperformance can only be discussed fairly against a reasonable standard that was understood in advance.

ASSESSMENT SUMMARY

WHAT WE ASKED

What should good performance have looked like? Was the standard clear? How was it communicated?

WHAT YOU TOLD US

Expected practice: monitor emails morning, lunchtime and evening; respond within 24 hours; process invoices promptly and at least three times each week to reduce late-payment risk. Amy indicated that the expectation had been explained previously.

COACH INSIGHT

◆ INTERPRETATION

The expected standard is relatively clear and measurable. The conversation should confirm that both people have the same understanding of frequency, response times and responsibility for shared-mailbox and invoice work.

CONVERSATION PRIORITY

LOW

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HIGH

Current position: 6/10

Why this rating? The standard appears clear, but it is worth checking whether ownership, prioritisation and the shared-mailbox process were equally clear in practice.

STRENGTHS IDENTIFIED

- ✓ Clear expected behaviours identified
- ✓ Timing and frequency can be measured
- ✓ Expectation was previously communicated
- ✓ Standard can be restated neutrally

AREAS TO EXPLORE

- Does the employee understand the same 24-hour response expectation?
- Who owns each type of shared-mailbox work?
- Are invoice priorities clear when other work competes?
- Is the three-times-a-week rhythm realistic and understood?

MANAGER PREPARATION SNAPSHOT

One-sentence standard: “Monitor the shared mailbox at agreed points each day, respond to requests within 24 hours and process invoices at least three times each week.”

C

CONSEQUENCES & CONTEXT

Why does it matter — and what might explain it?

WHY THIS MATTERS Impact matters, but context matters too. Explain why the gap matters while staying curious about what may be contributing to it.

ASSESSMENT SUMMARY

WHAT WE ASKED

What impact is the gap having? How significant is it? What could be contributing? What assumptions need to be tested?

WHAT YOU TOLD US

Current impact: customer/service, colleagues and risk. Significance: 7/10. Possible contributors to explore: workload/competing priorities, motivation/engagement and management/support. Assumptions identified by the manager need to be tested rather than treated as facts.

COACH INSIGHT

♦ INTERPRETATION

The impact is meaningful and extends beyond one task. Raw frustration is better translated into observable consequences: delayed service, reputational damage, colleague frustration and inefficient follow-up. The underlying cause is not yet fully understood.

CONVERSATION PRIORITY

LOW 1 2 3 4 5 6 7 8 9 10 HIGH

Current position: 8/10

Why this rating? This deserves the highest attention because the impact affects service, colleagues and risk, while the underlying cause is not yet fully understood.

STRENGTHS IDENTIFIED

- ✓ Wider impact has been identified
- ✓ Significance considered: 7/10
- ✓ Possible contributors being explored
- ✓ Manager has identified assumptions to test

AREAS TO EXPLORE

- What workload or priority conflicts are getting in the way?
- Is the work-allocation system clear enough?
- Is there a reliable scheduling or tracking method?
- What support or management practice may need to change too?

MANAGER PREPARATION SNAPSHOT

Go in with two messages at once: “This matters because of the impact” and “I want to understand what is getting in the way before we decide what needs to change.”

T

TARGET IMPROVEMENT

What needs to change?

WHY THIS MATTERS Improvement needs to be observable. Avoid vague targets about attitude or personality; define what different performance will look like in the work.

ASSESSMENT SUMMARY

WHAT WE ASKED

What specifically needs to improve? What would good performance look like in practice? How will both people know improvement is happening?

WHAT YOU TOLD US

Amy wants greater care and consistency in payment processing and a reliable system that both manager and employee can use. The original concern about “attention span” is better converted into observable work behaviours: checking, prioritising, tracking and completing work consistently.

COACH INSIGHT

◆ INTERPRETATION

The improvement target should combine behaviour and system: regular mailbox monitoring, timely replies, accurate payment processing and a shared tracking routine. This creates a fairer test than asking for a general improvement in attitude or focus.

CONVERSATION PRIORITY

LOW

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HIGH

Current position: 7/10

Why this rating? The direction is clear, but the target needs to be expressed as a small set of observable standards that can be reviewed in 1-2 weeks.

STRENGTHS IDENTIFIED

- ✓ Desired change is practical
- ✓ Manager recognises a system may help
- ✓ Improvement can be made observable
- ✓ Focus stays on work, not personality

AREAS TO EXPLORE

- What exact daily/weekly routine will be used?
- What will count as an on-time response?
- How will invoice work be tracked and checked?
- What evidence will show the new routine is working?

MANAGER PREPARATION SNAPSHOT

Draft target: “For the next 1-2 weeks, use the agreed tracking system, check the shared mailbox at the agreed times, respond within 24 hours and process invoices at least three times each week.”

S

SUPPORT & NEXT STEPS

What support and follow-through are needed?

WHY THIS MATTERS Support and follow-through turn a difficult conversation into an improvement process. Agree what each person will do and when progress will be reviewed.

ASSESSMENT SUMMARY

WHAT WE ASKED

What support could help? When should progress be reviewed?
What should the first conversation achieve? How confident are you about having it?

WHAT YOU TOLD US

Supports selected: clarification, more regular manager check-ins and more regular feedback. Review period: 1-2 weeks. First-conversation goals: clarify expectations, give clear feedback, agree what needs to change and agree support. Conversation confidence: 9/10.

COACH INSIGHT

◆ INTERPRETATION

Amy is ready to have the conversation and has identified proportionate support. The key is to make the follow-up specific: who will set up the tracking system, what support will be provided, and what evidence will be reviewed at the first check-in.

CONVERSATION PRIORITY

LOW

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HIGH

Current position: 6/10

Why this rating? The support plan is sound; the remaining task is to turn it into named actions, owners and a first review date.

STRENGTHS IDENTIFIED

- ✓ Support options identified
- ✓ Short review period agreed
- ✓ Purpose of first conversation is clear
- ✓ High conversation confidence: 9/10

AREAS TO EXPLORE

- What clarification is needed immediately?
- How often should check-ins happen in the first 1-2 weeks?
- Who will create or agree the tracking system?
- What will be reviewed at the first follow-up?

MANAGER PREPARATION SNAPSHOT

Close with four things written down: expected standard, agreed actions, support from the manager, and the first review date.