



Managing Performance AND Wellbeing: Remotely and On Site

with Joe Cheal

Lead Imaginarian & Trainer
Imaginarium Learning & Development



Having the Performance Conversation

A Few Considerations & Notes

1) **Context:** You are seeking to balance:

<p>Organisational Needs</p> <p>Performance Delivery Task Results</p>



<p>Individual Needs</p> <p>Wellbeing Welfare Mental Health Engagement</p>
--

Whilst you might want to keep ‘performance’ and ‘wellbeing’ conversations separate (depends on context and personalities), the two are interrelated. When people perform well to **reasonable** demands and workloads, they tend to feel good (wellbeing, motivation and satisfaction). They need to feel **‘on top’** of what they are doing. When people feel good, they are more able to perform well.

2) Consider the medium for your 1:1 conversation:

- Face to face (if possible) is usually best.
- Video is best for remote management, as you can read the person more easily and project more of your own expressions.
- Phone is a second-best choice.
- Email is not a good platform for emotive or sensitive topics!

3) Performance or Behaviour?

Are you dealing with a performance issue or behaviour issue (or both)? If it is a behaviour issue, be careful of the ‘attitude trap’. Focus on what they are **Doing**, not what they are **Being**.

4) During Pandemic/Lock-In: Remote Working

You will need to take each person on a case by case basis, agreeing with them (and HR if necessary) as to what they can practically achieve. What is their situation? For example:

- Environment & workspace (e.g. sharing space/technology/broadband, working space).
- Social/relationship (e.g. alone/isolated/with partner, children etc.)
- Other time/task priorities (e.g. home-schooling, caring for someone).
- Personality (e.g. happy working from home vs lonely, proactive vs reactive).
- Resilience/wellbeing (e.g. general mental, emotional and physical health).

5) Being Equitable

Respecting equality & diversity. Demonstrating flexibility – what ‘reasonable adjustments’ can you make?

Developing Empathy

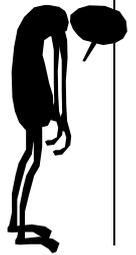
When you find someone's behaviour difficult, it may leave you feeling angry. In this situation, it can be challenging to develop any empathy. The following ideas may help, however:

1. Ask yourself: Why might I do that? Remember that we can all be difficult at times! Ask yourself: What must they have gone through to make them behave this way?
2. Are they difficult or just different to you (e.g. working-styles or culture)?
3. Remember: a difficult person is a person in difficulty! – You are much more likely to want to help a person in difficulty than a difficult person.

TYPICAL CAUSES OF DIFFICULT BEHAVIOUR/POOR PERFORMANCE

(NB. These are simply examples and not an exhaustive list.)

- Lack/loss of confidence
- Lack/loss of motivation
- Lack of competence/training
- Problems with another person at work
- Problems at home
- Illness



Coach
Act (e.g. solve the problem)
Refer
Escalate

HANDLING HEARSAY

If a member of your team makes a complaint about another member, but you have not directly witnessed it, avoid rushing in and accusing the other party. If they deny it, you have made things worse. When considering your options, take into account the possible consequences of your action.

Get as much specific, measurable information from them as possible:

- Ask questions to find out specifically what happened, when, where, who else witnessed etc.
- Do they want this taken further?
- Are they prepared to be named?

Possible options:

- 'Wait and see' (keep eyes/ears open).
- Coach them to deal with it?
- Mediate?
- Change the situation? Solve/remove the problem?
- Escalate to your manager or HR?
- Set a team ground rule at a team meeting (if a 'lesser offence' that is being committed by more than one person)?

The 'Change' Model Approach

Clarify

- Describe their behaviour/performance– what are you seeing them do.
- Give concrete evidence/examples. “I don’t know whether you’re aware but...”/ “Are you aware that...?”/ “I’ve noticed that...”
- Avoid talking about attitude. What is their behaviour that gives you the indication they have the attitude? Make it measurable.
- If they are behaving differently to their norm, you could say: “This is not like you, what’s happening?” and then go straight to “Analyse situation/cause”

Help

- Help them to see/acknowledge what they are doing and if possible, elicit their agreement.
- They may react with a variety of defences here. (See ‘Handling Defences’ below)

Analyse/Explore

- Explore situation/cause. “What’s happening?”
- If necessary, explain the impact of their behaviour/performance on others and themselves, but ONLY if they are not taking it seriously. You don’t want to ‘rub it in’!
- This may be an opportunity to practise some Hands-off coaching, helping them to resolve issues, remove obstacles, make decisions and set goals.
- If they don’t want to talk about it, find out if they will talk to someone else. You are within your rights to ask if it is personal or work related. If it is personal, ask if they are getting support and perhaps recommend any counselling services/Citizens Advice Bureau that may be available. If it is work related then you may need to be a little more persistent (“I need to know more if it’s affecting your work” – be ready for the possibility that you might be their issue!) If all else fails, contact HR.

Need/Standard

- Look for (or define) reasonable adjustments/alternative behaviour, benefits of change (and if necessary, consequences of continuance).
- Make sure the new behaviour/performance is like a SMART objective, so there are no ‘loop-holes’.

Get Agreement

- Seek agreement on a way forward and on a review date.
- Write notes of the meeting e.g. in the form of action points. Let them have a copy.

Evaluate/Review

- Review at the specified later date.
- This gives a deadline and hence motivation to resolve the issue. It also demonstrates that you are taking it seriously.

Handling Defensiveness

The following defences may occur when you are taking someone through the CHANGE model, especially at the 'Help them to acknowledge it' stage. It is essential that you are basing your feedback on first-hand experience and not on hearsay. Stay compassionate and professional.

Please note that these are illustrative examples only i.e. what you could or might say. You need to find your own way of approaching these situations and use your own words!

1) **Denial** – “No I didn’t”, “It wasn’t me”

Response: “I was there. I saw/heard you do it.” Give a specific example.

2) **Intention** – “It wasn’t my intention to do that”

Response: “Okay, but can you see how others might see it/feel about it?”

3) **So What?** – “So what?”, “Everyone has an off day”

Response: Explain the impact it has on the team/job/organisation/you etc.

If it has happened more than once: “but this is not the first time it’s happened, is it?” then state other examples.

4) **Blame** – “It wasn’t my fault”, “It was your fault”

Response: If they are blaming another person/department, get the full details. Remember that it usually takes two to tango. How much of their performance drop is due to the other party?

If they are blaming you, ask: “Is it 100% me?” If not totally you, ask what else is going on?

Then explore what they feel is your fault. If this is something you can (and are prepared) to change, ask: “So if I do ‘X’/stop doing ‘X’, then your behaviour/ performance will return to normal?”

5) **Silence**

Response: “This is not the you I know, what’s happened?”, “If you don’t say anything, I can only make assumptions” – offer support or an alternative person to talk to. Remind them you will do what you can to help them.

If you feel the silence is ‘will-full/rebellious silence’, state the performance/ behaviour that you expect, set a review date and remind them that they can come to talk to you at any time.

6) **Tears**

Response: Be there. Softly ask: “Okay, what’s happened.” If necessary, give them a time out, but return to the issue after a reasonable ‘composure’ time.

7) **Victim** – “You’re picking on me”

Response: “I’d be speaking to anyone in the team who did ‘X’”

You could also try asking them: “If you were managing someone who did ‘X’, what would you do?”

WHO STOLE MY PIE?

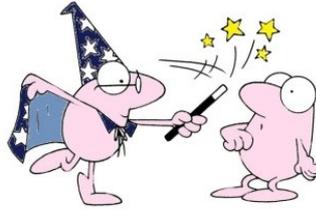


How to manage priorities, boundaries and expectations

Joe Cheal

THE LITTLE BOOK OF PERSUASION

UPDATED



Joe & Melody Cheal

SOLVING IMPOSSIBLE PROBLEMS



Working through Tensions and Paradox in Business

JOE CHEAL

the MODEL presenter



Developing Excellence in Presenting and Training

Joe Cheal & Melody Cheal

THE LITTLE BOOK OF RESILIENCE



Joe & Melody Cheal

The Relationship Dance



A Guide to Loving Gracefully

Joe & Melody Cheal

Becoming Happy!
Lessons from Nature



Melody Cheal

Imaginarium?

An imaginarium is a place of wonder... a safe place to learn...
to test out and develop practical ideas for application 'back in the real world'.

Imaginarium Learning & Development is a consultancy that specialises in inspiring the imagination and potential of organisations, leadership, management and individuals through OD, L&D and Executive Coaching.

Since 1993, we have worked with a wonderful collection of companies, always seeking to work in partnership... enhancing the profile of leadership, learning, training and development in our client's organisation. As well as leading the market in our specialist fields, we are serious about continuous improvement and ongoing learning, keeping up to date with leadership, management and HR issues. Each key trainer has over 20 years training experience and has worked with over 10,000 people from a range of industries and cultures.

Our aim is to provide flexible, high quality training and learning solutions to all of our clients. Our mission is to oil the wheels of development... making life easier for people in a time of ever-increasing complexity... engaging and empowering people to be the best they can be...

Courses

Imaginarium Learning & Development offers a range of L&D consultancy services including needs assessment, design and provision of training courses. Courses can be adapted from a half-day to two-days in length and some topics can be presented as short 'spotlight' sessions.

WELLBEING & MENTAL HEALTH

- Coping with Change
- Dealing with Pressure
- Positive Mental Health Toolkit
- Resilience: Developing the 'Bounce Back' Factor
- Staying Positively Happy
- Stress Management
- Wellbeing: Staying Psychologically Healthy

LEADERSHIP DEVELOPMENT

- Change Leadership
- The Complete Leader: Inspirational & Practical
- Delegate!
- Feedback for Effectiveness
- Developing People: Leader as Coach
- Having tough conversations
- Leadership in Action
- Managing People Successfully
- Making Meetings Work
- Motivate!
- Project Leadership
- The Supportive Manager
- Team Building and Development

PERSONAL IMPACT

- Career & Profile Development
- Innovation: Getting Creative
- Making Your Life Work 4U: Confidence
- Networking Skills
- Personal Power
- Time Management
- Understanding/Managing Unconscious Bias

IN FRONT OF THE AUDIENCE

- Advanced Presentation Skills
- The Essential Presenter
- Persuasive Presentations
- Train the Trainer

EXECUTIVE DEVELOPMENT

- Advanced Negotiation Skills
- Becoming a Mentor
- Strategic Change Management
- Making NLP Work
- Organisational Development
- Organisational Politics
- Troubleshooting: Problem Resolution
- Working with Transactional Analysis

RESULTS AND RELATIONSHIPS

- Assertiveness: Clarity and Focus
- Building Partnerships
- Conflict Resolution
- Customer Care
- Dealing with Difficult People
- Delivering the Message: Communication
- Handling Conflict in Meetings
- Influence and Persuasion
- Magic of Mediation
- Negotiation Skills
- Understanding Personalities

HR SKILLS FOR MANAGERS

- Appraisal
- Capability & Disciplinary
- Controlling Absence
- Dealing with Poor Performance
- Dealing with Bullying and Harassment
- Introduction to Counselling
- Interviewing Skills

CERTIFICATIONS

- Coaching Diploma
- NLP Business Diploma
- NLP Practitioner
- NLP Master Practitioner
- NLP Trainer's Training



Imaginarium

LEARNING & DEVELOPMENT

Imaginarium Learning & Development
Oakhurst, Marden's Hill, Crowborough, E. Sussex. TN6 1XL
Tel (01892) 309205 Email: info@imaginariumdev.com

www.imaginariumdev.com