

BUSH
LAW FIRM
P.C.


O. 281.296.3883 | F. 281.296.3884
21 Waterway Ave., Ste. 200 | The Woodlands, TX 77380
L.Winkelman@bush-law.com | www.bush-law.com

DOCUMENTING PERFORMANCE MANAGEMENT: THE RED-HEADED STEPCHILD

Main Street HR
Bush Law Firm
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Apologies in Advance...



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The What, When, & How

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What to Document

- Keep it simple: Just document the employee's performance
- The bad:
 - Compliance with work-place rules
 - Poor performance of the duties of the job itself
 - Determining salary levels, titles, and pay grades
 - Reasonable accommodation controls
- Don't forget to document the good

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When to Document

- At or around the time of the event (good or bad)
- Waiting too long to document a performance problem could be harmful in litigation

How to Document: Generally

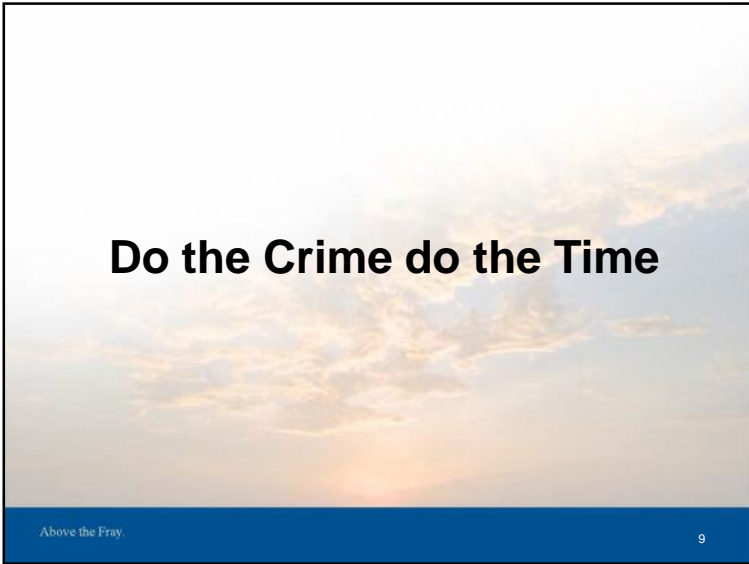
- Remember: If it's not documented, it didn't happen
- Medium
 - Email to self/HR for a talk
 - Written acknowledgement (by employee) of talk
 - Written counseling
 - Performance improvement plan (PIP)

How to: Basic Principles

- Factual: No editorializing
- Cite back to policy or performance expectation
- Explain why meeting the policy or expectation is important
- If ongoing, reference previous counseling

PIP Specifics

- Be careful: Can be demotivating
- Remember: The employee is a human being
- Balance concern for the person with the needs of the business



Punishment Should Fit the Crime

- Does the discipline meted out match the issue's impact on your business?
- Evenly meted out? What does "similarly situated" even mean? Is it a unicorn?
- Leaders and high expectations

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Delivering the Sentence

- Face-to-face please!
- If written, get the employee's signature
- If employee refuses to sign, document that too

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Documenting a Termination

- Always document the date of the decision
- List all of the reasons

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The Weak Manager, Performance Evaluations, & Progressive Discipline Policies

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13

Manager Didn't Document: Help!

- Counsel the manager
- Address the issue with the team:
 - If manager is still around, the manager addresses the issue and has a mea culpa
 - It's fine for HR to address the team, but this is part of "performance management" for the manager
- It's never too late to start (be sure to reference any past informal coaching)

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14

Annual Performance Evaluations

- Pros & cons
- Weak managers love annual performance evaluations
- If the performance evaluations are so good, why are we firing this employee, again?

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Progressive Discipline Policies

- Pros & cons
- Can help weak managers
- If you've got one, just follow it. If your company is consistently failing to follow it, maybe it needs to be tossed or revised.

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16

Questions?



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17

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18

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Lee Winkelman

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19