Eight Things to Remember When Dealing with Poor Performance

Michael Flora, MBA, M.A.Ed, LCPC
Senior Operations and Management Consultant
michael.flora@mtmservices.org

Few managers relish the prospect of having to address poor performance. It's often very stressful when you have to address team members who are failing to meet the requirements of the job, and you probably feel as though you could do better things with your time. People who excel at managing performance also develop a state of mind that helps them approach each case objectively, which in turn drives better results. Focus your mind on the right approach to managing poor performance by remembering these important points.

Statistics indicate that more than 80 percent of job dismissals are directly related to conflict in the workplace. Many conflicts on the job stem from factors such as personality clashes, low performance, differences in opinion, and misunderstandings. Communication between team members and leadership is perhaps the most important factor in the success of a healthcare practice. Team members need to be aware of what their employer expects, how they are progressing on the job, and if there are any issues they need to work on to improve their job performance. Likewise, leadership needs to understand where their team members are in their performance and barriers to peak performance. Many misunderstandings and workplace conflicts can be avoided simply by implementing an ongoing communication and supervision system on the job.

Team member supervision and coaching sessions are one of the best methods of communication an employer can implement in the workplace. Consistent and continual performance evaluations are essential to the success of any healthcare practice. Not only do they give the team members a chance to voice any barriers about their performance, they provide an opportunity for you to accurately access the contribution of the team members to your healthcare practice, inform them of any changes they may need to make in their work performance, and praise them for their efforts. Team member supervision and annual reviews should cover a multitude of areas, including work ethic, attitude, job performance, and more. Following are some tips for conducting team member supervision:

**Consistency is vital**
Poor performance cases often collapse because the manager dealing with the issue is inconsistent in his/her approach. You cannot treat one team member differently to
another when the performance problem is the same. When you develop strong relationships with your team, it is often difficult to approach these situations in a consistent manner, but you must put aside your personal opinions, and focus solely on the performance issue. If two people are failing to meet their performance targets or Key Performance Indicators (KPIs), you must approach them both in exactly the same way, or you could end up in trouble.

Team member supervision and performance reviews should be performed on a regular basis. While supervision and coaching sessions make for a great assessment of your healthcare practice, evaluations and feedback should occur more than once a year. Some companies prefer to provide supervision on a monthly basis. I recommend that supervision occur weekly and provide performance reviews quarterly or bi-annually. Regardless of how often you decide to perform supervision, alert team members to when they will be evaluated and let them know ahead of time what to expect. It is also important to remain consistent in the topic areas for review and the performance data that will be evaluated. Prepare a standard set of questions and areas to review and stick with that particular format. This often makes it easier for both the employer and the team member.

People generally want to do a good job
Too many managers dismiss their team members as lazy or disinterested. If you scratch beneath the surface of any situation, you will usually find that there is a very good reason that somebody is not performing well. They may not have received the right training or they may simply not understand what you expect from them. Never initially write off a team member as a waste of time. With the right opportunities and coaching, you can help your team member meet the expectations needs of the job.

You need examples
Examples of poor performance are critical when managing poor performance. You cannot make subjective, sweeping statements such as "you're always late" or "your paperwork is always late." You must substantiate your comments with evidence and data, and you must remove any emotion from your comments. "You have been late thirteen times in the last month" is a factual statement, and clearly outlines a specific issue. Of course, it is not always easy to find examples. If you think that one of your team members is rude, you will need to see and hear specific example of this before you can take action. Without examples and data, you cannot manage poor performance.

Document your Supervision
While your team member supervision may only occur a couple of times a month, it is important to keep a file on each team member and note any special circumstances, progress, performance, work ethic, and any other areas that may be essential to the success of your healthcare practice. In our book, Operationalizing Health Reform, I
discuss the use of collaborative documentation into a supervision log. These logs should reflect detailed information regarding the performance, attitude, aptitude, and behaviors needed for success. These logs are also useful when conducting an annual performance review as you can reflect on the past 12 months of performance and document the dates and times you addressed performance in supervision, solutions plans developed and progress or lack thereof of improvement. It is especially important to include this step if you have a large team that you manage.

Many poor performance cases become very messy because managers fail to document discussions. You have to put every conversation and meeting into writing, noting the date and time, that it took place, and the names of anyone present. Cases of this nature quickly become messy if you cannot refer back to details. In the event that somebody accuses you of behaving unfairly, written records can prove exactly what you have and have not said.

Cover All Areas Thoroughly
Developing performance-based supervision addressing the KPIs is a standard management practice. Below is an example of a Supervision Log that illustrates the topic areas to be addressed in supervision. The Manager simply checks the appropriate boxes of the performance areas they will be reviewing during the supervision session.

<table>
<thead>
<tr>
<th>Staff Member:</th>
<th>Supervisor:</th>
<th>Program/Dept:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Topics Discussed:</td>
<td>(Check all that apply)</td>
<td></td>
</tr>
<tr>
<td>Clinical Supervision</td>
<td>Utilization Management</td>
<td>Treatment Plans/Assessment</td>
</tr>
<tr>
<td>Billable Hour Standards</td>
<td>No Show Rate</td>
<td>Payor Mix</td>
</tr>
<tr>
<td>Cooperation/Participation</td>
<td>Annual Leave</td>
<td>Sick Leave</td>
</tr>
<tr>
<td>Accuracy of Work</td>
<td>Tardiness</td>
<td>Performance</td>
</tr>
</tbody>
</table>

You should be certain that you cover each area thoroughly and that the team member completely understands the evaluation. For instance, if the topic area is around billable hour standards, explain what you look for when you consider this area, what data you use to review performance. Let the team member know how they are performing against the standard. Why you are concerned or why you are pleased with their performance, and give specific examples of what you expect. Make sure they completely understand this before moving on to the next topic area.

Listen to and Address Team Member Concerns
Once you have thoroughly covered each area, ask your team member if he or she has any questions. Listen closely to the concerns that are expressed and answer his or her inquiries to the best of your ability. Your team members should not feel intimidated or rushed through supervision or a performance review. Make certain they feel...
comfortable voicing their concerns and misunderstandings. Ask them if they thought the review was fair and if they agree with your assessments.

**You have to set expectations**

If your team members do not know what you expect from them, you cannot address their poor performance. Many managers embark on poor performance plans, which then fall apart because it is soon clear that their team members do not have performance based job descriptions, KPIs and goals. Before you take a more formal approach to performance management, check that your team members are all working to the same standards and targets. In a busy working environment, it is easy to assume that everyone knows what you need from them, but if you do not document and communicate your expectations, your team cannot work effectively.

A single poor performance case is a significant drain on a manager's time. Many managers shy away from managing their team members robustly because they lack the confidence that they can reach the right outcome. With the right standards and expectations, it is actually very easy to manage your people, but it always requires the right approach.

**Wrap it up on a Positive Note**

Try to end all team member supervision and coaching sessions on a positive note. Nobody likes to walk away from review or supervision session with negative feelings. Summarize everything a final time and end by highlighting their positive points and contributions to the healthcare practice. Get confirmation and acknowledgment from the team member of their commitment to improve performance.

Team members who know and understand what is expected of them, learn what things they need to work on, and receive recognition for a job well done are happy and satisfied. Happy team members positively affect your healthcare practice and make for a comfortable and inviting practice atmosphere where consumers feel welcome, production is high, and every team member feels like a team player.

Remember if a staff member is not meeting performance, it is an individual staff issue. If many staff are not meeting performance expectations, it may be your approach and leadership... more on that next time.

**About the Author:** Michael Flora, MBA, M.A.Ed, LCPC is the Senior Operation’ and Management Consultant for MTM Services and a National Council Senior Consultant. Mr. Flora is the CEO of a multimillion dollar behavioral healthcare organization and its four subsidiaries, and a renowned consultant, speaker, and author. He has extensive experience in strategic planning, marketing, performance improvement, workforce development, leadership coaching and training, board governance, and healthcare mergers and acquisitions. He has been recognized as Behavioral Health Champion and his organization is a recipient of the SAMHSA Science and Service Award for prevention programs. He has over 25 years of clinical and
administrative experience. Consult engagement scheduling and copies of his current featured book Co-Authored with other MTM Services experts Operationalizing Health Reform may be arranged through contacting marian.bradley@mtmservices.org.