

Task improvement process

Overview

This process will help you support an employee to commit to a reasonable plan to improve their performance and productivity on a specific task. Don't use this process if you're beginning progressive discipline or planning termination. Implement this good-faith process when you're genuinely striving to support the employee's success.

If you also need to address behaviours or multiple performance issues, you may want to begin with a broader approach such as Developing a workplace plan.

Before your conversation with the employee

Be clear about the purpose of the meeting

You might say to the employee, “Let’s meet on [day] at [time] at [location] to explore ways we can improve how [the task] gets completed. I’ll ask you to tell me what you do now, how long it takes and any challenges that might get in your way. I’ll then ask you to come up with a plan that makes it easier to be successful every time. I want to see how I can support you to do this well instead of jumping into a formal performance management approach.”



Create a safe place

Take an open and relaxed approach throughout the discussion. Check your body language, tone of voice and intensity.

Ask, don’t tell

This approach is about asking the employee how they’ll be successful. It’s not about telling them. Resist sharing your opinion and generally speak less and ask more. If the employee is silent at first, give them time to think through their response. They’re likely stressed to be in this meeting.

Focus on success in the future

The employee likely knows they fell short. And if they didn’t before, they do now because they’re having a conversation with their leader about doing things differently. It’s already humiliating enough. Don’t get into blaming or shaming. This could cause them to either become defensive or shut down. Instead, focus the discussion on how they’ll successfully complete similar tasks in the future.

Be optimistic and supportive

You may be frustrated with past performance. Act as if you believe they can do this and show you're there to help. You never know what someone's going through and how it may be affecting their performance. Stay supportive. It's more likely the employee will take responsibility for their work performance and recognize that you tried to help. If you need to move on to progressive discipline, it's less likely they'll see it as unfair.



Be prepared, but don't share up front

Know how you'll measure success for this specific task before having the conversation with your employee. Be as clear as possible to avoid any misinterpretation of your intended outcome. Here are some things to think about when deciding on your measurement:

- The requirement should be the same as for the average employee doing the same task. This helps you avoid any concern about discrimination. For example, the employee might have been exceptional in doing the task. Then, their performance or productivity slipped. It's fair to expect them to meet the same requirement as other employees.
- Base it on objectively clear and specific measures and not vague descriptors. For example, excellent or high quality are vague instructions and could be unreasonable. It's a specific instruction to ask for no more than one mistake for every 20 widgets on average.
- Be clear on the amount of time it takes the average employee to complete the task, rather than the fastest possible time. Striving to go faster can happen after the first successful completion of the task.

Don't share this information with the employee in advance. It's for you to familiarize yourself with the task before your meeting. In the meeting you'll allow the employee to share their perspective of success first. This way you identify any differences in understanding and can coach the employee toward a reasonable goal.

Employee meeting

The Task improvement worksheet is for you and your employee to complete together. You may review the following notes beforehand.

You know what success means to you and how the employee should be completing the task. Here, you're asking the employee to describe what success means to them, in their own words. It gives them a chance to show their understanding and for you to see how it aligns with your expectations. Be open to hearing about either personal or task-related challenges you may not have considered.

1. The task I want to focus on for this conversation is:

Be clear about the specific task you're trying to improve; this process isn't meant to address multiple tasks at one time.

2. Please describe for me how you would know you've completed this task successfully.

- Consider asking what exactly makes the difference between failure, satisfactory and total success.
- Listen to the employee's explanation of success. If that's not aligning with your expectations collaborate and coach so you both arrive at a shared understanding.

3. Please describe what you need to successfully accomplish the task.

This could include:

- → Information
- → Resources
- → Equipment
- → Time
- → Support
- → Training, mentoring or contributions from others

- Continue to ask, "And what else?" until they agree that's all they need.
- Help the employee to also think about potential organizational challenges such as:
  - → Competing demands
  - → Unexpected changes
  - → Lack of resources or equipment
- Record anything you'll do or provide to support the employee to complete this task. Then, set a reminder for yourself to follow through. Ask the employee to review your list and confirm that's all they need to successfully complete the task.

4. If we put these things in place, how much time do you think it will take you to complete this task successfully the first time?

Ask the employee how much time they need rather than telling them to help identify any additional obstacles or challenges. If it's a lot more or less time than you think it should take, ask them to share a more detailed timeline. Listen carefully to their explanation. Consider if more time's needed or explore ways to reduce the time required.

5. **Given all your other work tasks, when do you think it's reasonable to expect you to complete this task?**
   - After this date you can check in with the employee to see how they've done.
   - Set the appointment date, time and location for follow-up. Make sure it's in both your calendars.

6. **Please record both the times and dates when you're working on this and any challenges or supports you encountered.**

   You might follow up with: "While I know it's extra work, I want to be aware of what's helpful and challenging in finishing the task. For example, a cancelled meeting that gives you more focused time than usual could be a support. If a meeting gets added to your schedule the lost time could be a challenge. Please track challenges and supports for our next meeting."

7. **I'll send you a copy of our discussion notes and a meeting reminder for our follow-up.**
   - Do this as soon as possible after the discussion.
   - Here's wording you can modify to send to the employee: "Thank you for the time you've spent with me today. Attached are the details of our conversation that include your plan for action. Please remember to track the time you or someone else spends on [completing the task]. And, record any challenges or supports that affected your ability to be successful. We'll meet again on [date, time, location]. If there's anything you need in the meantime, please feel free to get in touch with me.





Follow-up meeting

The follow-up date is dependent on the ability of the employee to complete the task successfully. Your meeting should be as soon as possible after the agreed-upon due date. A couple days before, send a reminder to ask your employee to bring the time log and list of challenges and supports they recorded for the task. It's also important to know how success or quality was objectively measured by the employee.

Following up will help you to either celebrate success or take further corrective action. There's also a paper trail you can use if your next step is progressive discipline or ongoing performance improvement.

In your Task improvement worksheet, you're provided with questions you might ask at the follow-up meeting, including:

- What supported or hindered your success in completing this task?
- How did you measure success?
- What will you do differently now so you can be successful next time?

If the first attempt was successful, set up another time to see if they're able to continue with the same level of success. Remember to recognize the employee's effort.

Stay supportive for one or more additional follow-ups to show your intention to be supportive.

Next steps

In most cases, there should be at least one more follow-up. This will help you decide if the success will stick or if there's a better way to achieve success.

If the first attempt wasn't successful, you can go through the entire discussion again. Make any adjustments the employee feels they need. The question(s) to add to this subsequent discussion could be:

- Is there anything else you think might get in the way of you being successful this time?
- What do you think should be our next step if this attempt isn't successful?

If progressive discipline will be part of the process, let the employee know you're giving them another chance to work through this before you begin the formal process.



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