AFTERNOON SESSION

# Performance & Practical Leadership

Moving from managing work to leading people

Do not edit
How to change the design



**When a performance issue continues longer than it should, what is usually the biggest reason?**

The Slido app must be installed on every computer you're presenting from

slido

PERFORMANCE MANAGEMENT

# Performance Management Is a Process

PERFORMANCE MANAGEMENT IS NOT:

## Annual Review = Performance Management

PERFORMANCE MANAGEMENT IS:

EXPECTATIONS → OBSERVATION → FEEDBACK → COACHING → FOLLOW-UP → ACCOUNTABILITY

STEP 1

# Set Expectations

ASK

What does good performance look like?

What results are required?

What behaviors are expected?

What deadlines matter?

How will success be measured?

Employees cannot consistently hit a target they cannot see.

STEP 2

# Observe

Managers need to know what is actually happening.

FOCUS ON

## Results

- Patterns
- Quality
- Impact on others

## Behaviors

- Deadlines
- Communication

**Manage based on facts — not assumptions.**

STEP 3

# Provide Feedback

## FEEDBACK SHOULD BE

Timely

Specific

Direct

Respectful

Actionable

Ongoing

Feedback isn't only for poor performance. Reinforce what you want repeated.

FEEDBACK SHOULDN'T BE SCARY

When an employee hears…

# “Can I give you some feedback?”

What do they usually assume?

**Something bad is coming.**

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If feedback only happens when something is wrong, employees learn to fear it.

FEEDBACK

# A Simple Feedback Model

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| | |
|---|---|
| **SITUATION** | When or where did it occur? |
| **BEHAVIOR** | What specifically happened? |
| **IMPACT** | Why does it matter? |
| **EXPECTATION** | What needs to happen going forward? |

FEEDBACK

# Feedback Example

INSTEAD OF

“You need to communicate better.”

TRY

“During yesterday's shift change, the team wasn't informed that the schedule had changed. Two employees reported to the wrong location, delaying the start of the work. Going forward, schedule changes need to be communicated to the entire team before the end of the prior shift.”

Specific feedback creates actionable expectations.

FEEDBACK

# Address Behavior — Not Personality

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AVOID LABELS SUCH AS

| | | |
|---|---|---|
| Lazy | Negative | Difficult |
| Unprofessional | Bad attitude | Not a team player |

INSTEAD DESCRIBE

What did the employee actually say, do, or fail to do?

ACTIVITY

# Turn the Feedback Around

Rewrite one of these statements:

“You need to be more professional.”

“You need to take more initiative.”

“Your attitude needs to improve.”

“You aren't being a team player.”

“You aren't communicating.”

“Your work needs to improve.”

USE

**Situation → Behavior → Impact → Expectation**

PERFORMANCE CHALLENGES

# Before You Discipline — Diagnose

When someone isn't performing, ask:

| | |
|---|---|
| **CLARITY** | Do they know what is expected? |
| **CAPABILITY** | Do they have the necessary skill? |
| **RESOURCES** | Do they have what they need? |
| **MOTIVATION** | Are they willing to perform? |
| **ACCOUNTABILITY** | Has the expectation actually been enforced? |

PERFORMANCE CHALLENGES

# Skill Issue or Will Issue?

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| SKILL / CAPABILITY | WILL / ACCOUNTABILITY |
| --- | --- |
| “I want to, but I don't know how.” | “I know what I'm supposed to do, but I'm not doing it.” |
| Training | Direct feedback |
| Coaching | Clear expectations |
| Resources | Follow-up |
| Practice | Accountability |
| Clearer instruction | Appropriate consequences |

PERFORMANCE CHALLENGES

# Don't Jump to Conclusions

Poor performance may have several causes. Ask before assuming:

Does the employee understand?

Has anything changed?

Is there an obstacle?

Have I addressed it previously?

Have I been clear?

Have they been trained?

Is this new or a pattern?

What does the employee say is happening?

**Diagnose before deciding the solution.**

PERFORMANCE CHALLENGES

# The Cost of Avoiding Performance Problems

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## WHEN MANAGERS DON'T ADDRESS POOR PERFORMANCE

Strong employees notice

Workloads become uneven

Resentment builds

Standards decline

Trust decreases

Manager credibility suffers

Turnover risk increases

What a manager repeatedly allows can become the team's unofficial standard.

PERFORMANCE CHALLENGES

# Have the Conversation Early

Don't wait until you're angry.

Don't wait until the annual review.

Don't wait until everyone else is complaining.

Don't wait until termination feels like the only option.

**Small conversations early are easier than big conversations later.**

DOCUMENTATION

# Documentation Is a Management Tool

## GOOD DOCUMENTATION INCLUDES

- Date and time
- Specific facts
- Expectation communicated
- Employee response
- Coaching/support provided
- Next steps
- Follow-up date

DOCUMENTATION

# Keep Documentation Objective

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## INCLUDE

- Facts
- Behaviors
- Dates
- Examples
- Expectations
- Employee responses
- Follow-up

## AVOID

- Opinions
- Diagnoses
- Emotional language
- Exaggeration
- Assumptions about intent

DOCUMENTATION

# The Documentation Test

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## BEFORE SAVING DOCUMENTATION, ASK:

> Could another manager or HR professional read this six months from now and understand exactly what happened?

If not, add more context.

SECTION

# Transitioning from Peer to Manager

Your job changed. Your relationships will change too.

PEER TO MANAGER

# Yesterday's Peer — Today's Manager

## COMMON CHALLENGES

- Managing former peers
- Fear of appearing “bossy”
- Wanting everyone to still like you
- Avoiding difficult conversations
- Overcompensating with authority
- Maintaining confidentiality
- Managing friendships
- Treating former friends consistently
- Establishing credibility

PEER TO MANAGER

# Your Responsibility Has Changed

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## AS A MANAGER, YOU ARE NOW RESPONSIBLE FOR

- Fairness
- Confidentiality
- Accountability
- Performance
- Team dynamics
- Organizational decisions
- Communication
- Setting the tone

**You are responsible for more than your own work now.**

PEER TO MANAGER

# Relationships Don't Have to Disappear

But boundaries must change.

CONSIDER

What information can I still share?

How do I handle social relationships?

Am I treating former friends differently?

Am I avoiding accountability because of the relationship?

Am I trying too hard to prove I'm the boss?

Aim for consistency — not distance.

QUICK DISCUSSION

# What becomes harder when yesterday's peer becomes today's manager?

| | | |
|---|---|---|
| Relationships | Accountability | Confidentiality |
| Authority | Communication | Trust |

SECTION

# Resetting Team Expectations

Sometimes the team needs a reset.

# When Is a Reset Needed?

You're newly promoted

You've inherited an existing team

Accountability has been inconsistent

Old habits are creating problems

Expectations have changed

The organization is changing

Performance standards need to improve

Team dynamics need attention

RESETTING TEAM EXPECTATIONS

# Don't Start With...

> “Everything is going to change now that I'm in charge.”

INSTEAD



# Acknowledge

RECOGNIZE

Existing relationships

Past practices

Team history

What's working

What employees may be concerned about

A reset doesn't require pretending the past didn't happen.

# Clarify

EXPLAIN

Your role

Your responsibilities

How decisions will be made

How communication will work

What employees can expect from you

What you expect from them

RESETTING TEAM EXPECTATIONS

# Reset

Establish expectations around:

Communication

Performance

Accountability

Team behavior

Decision-making

Conflict

Escalating concerns

Follow-through

RESETTING TEAM EXPECTATIONS

# Reinforce

A reset only works if the manager follows through.

Recognize desired behavior

Address missed expectations

Be consistent

Follow up

Model the expectations yourself

A reset without follow-through is just another meeting.

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CAPSTONE ACTIVITY

# What Would You Do?

SCENARIO 1

# The Former Peer

You were recently promoted. One of your closest former peers continues treating you as though nothing has changed and regularly challenges your decisions in front of other employees.

**What would you do?**

SCENARIO 2

# The Long-Term Underperformer

You've inherited a team. One employee has missed expectations for months, but the previous manager never addressed the performance concerns. The employee believes everything is fine.

**What would you do?**

SCENARIO 3

# The High Performer With a Behavior Problem

Your strongest technical employee consistently exceeds performance goals. However, they:

- Interrupt coworkers
- Dismiss others' ideas
- Create tension on the team

**What would you do?**

SCENARIO 4

# “Nobody Told Me”

An employee fails to complete an important responsibility. When you address it, they respond: “Nobody told me that was my responsibility.” You believe they should have known.

## What would you do?

SCENARIO 5

# The Manager Who Waited

You've informally discussed the same performance issue several times over the past three months. Nothing has changed. There is very little documentation. You are now frustrated and want formal action.

**What would you do?**

# The Manager's Practical Playbook

When something isn't going well:

- Don't ignore it
- Get the facts
- Check the expectation
- Have the conversation
- Listen to the employee
- Clarify what happens next
- Document appropriately
- Follow up
- Involve HR when needed

# Bringing It All Together




Effective people management is continuous — not something we do only when there is a problem.

MY MANAGEMENT COMMITMENT

# Before you leave, identify

One conversation I need to have

One expectation I need to clarify

One management habit I need to improve

FINAL TAKEAWAYS

# Effective managers:

Set clear expectations

Communicate consistently

Give feedback early

Address problems directly

Listen before making assumptions

Document appropriately

Follow through

Hold people accountable

Know when to involve HR

Model what they expect from others

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## Clear. Consistent. Timely. Fair.

Great people management isn't about always having the perfect words.

**It's about being willing to have the conversation.**

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# Questions

PRESENTED TO THE MEMBERS OF

PACD