



HR DELIVERY

Making Sure HR Delivers

HR DELIVERY WORKSHOP SERIES

Managing Performance Problems

An introduction to managing performance problems

Practise a fair first response when performance falls short. Explore expectations, evidence, employee perspective and support, using selected PERFORM focus questions to prepare a useful conversation and recognise when specialist guidance is needed.



01 DAY

Introductory taster

IN-HOUSE

Your people. Your context.

PRACTICAL

Explore, discuss and apply

A PRACTICAL STARTING POINT

Understand the topic. Try it in practice.

A missed standard can reflect unclear expectations, skill gaps, workload, resources or other circumstances. Managers need to understand the situation before choosing a response. This introductory workshop develops a structured first conversation, helping participants distinguish evidence from assumptions, explore support and recognise issues that require the appropriate specialist route.

Help managers and HR colleagues prepare a proportionate initial response to a performance concern. Participants practise describing the gap, listening to the employee and drafting support and review actions, while respecting policy boundaries and avoiding premature conclusions about capability, conduct or health.

WHO IS IT FOR?

People managers, supervisors and HR professionals who support everyday performance conversations. The workshop suits those seeking an introductory practice session and does not require experience of formal employee relations casework.

BY THE END OF THE DAY, PARTICIPANTS CAN:

- | | |
|--|---|
| 01 Describe the concern
Describe a specific performance gap using the agreed expectation, relevant observations and work impact without attaching unsupported personal labels. | 02 Check the conditions
Identify questions about clarity, skills, resources, workload and other relevant conditions that should be explored before selecting a response. |
| 03 Hear the employee view
Practise an opening conversation that invites the employee perspective, checks understanding and avoids assuming the reason for the concern. | 04 Draft practical support
Develop a provisional support action and review point linked to the performance expectation, employee input and available workplace resources. |
| 05 Recognise referral needs
Identify when a concern should be referred through the appropriate HR, health, support or formal policy route for qualified guidance. | 06 Record proportionately
Draft a concise factual conversation note covering the concern, employee response, agreed support, outstanding questions and the next review. |

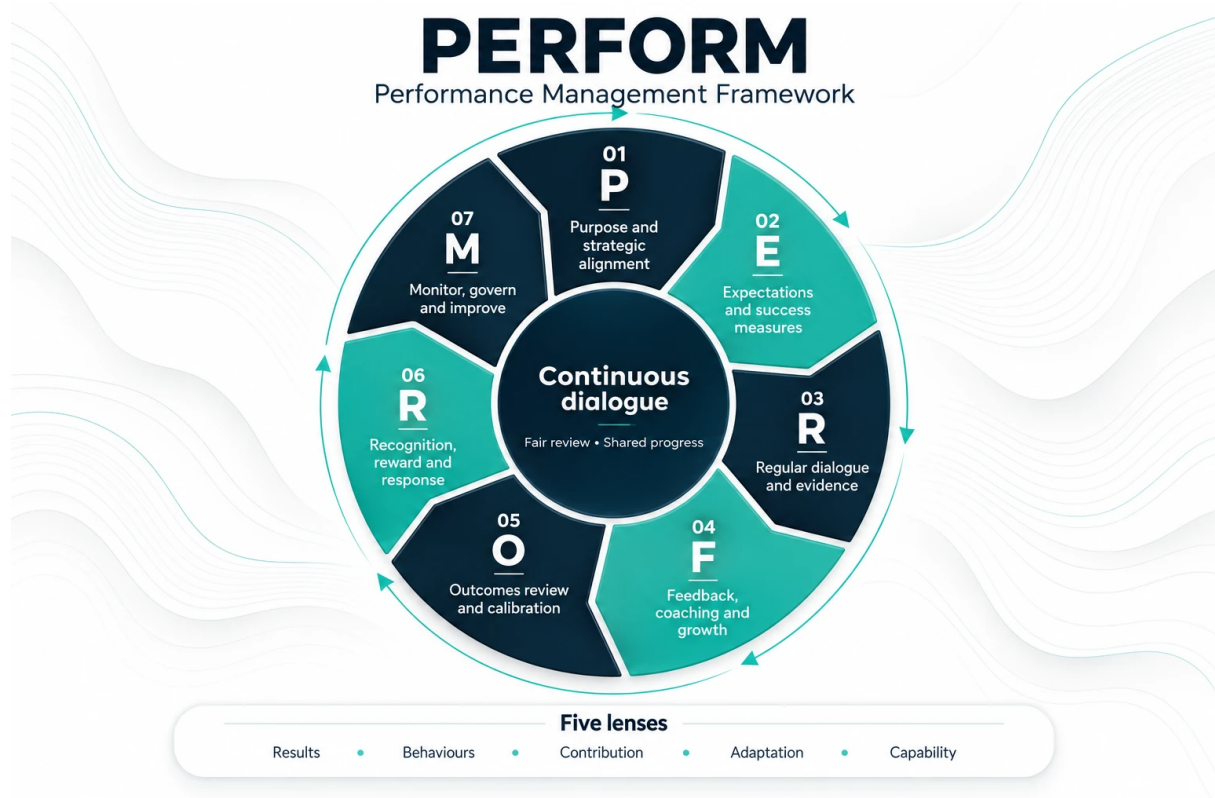
A useful first application

An introductory practice day for early performance conversations. It does not train participants to diagnose health conditions, determine misconduct or conduct formal procedures; organisational policy and qualified local guidance remain essential.

THE FRAMEWORK / WORKSHOP FOCUS

PERFORM Framework

The seven-stage PERFORM Framework provides the wider performance cycle. This workshop selects six focus questions about concerns, evidence, conversation, support, response and follow-up while retaining all seven original stages.



SIX QUESTIONS TO EXPLORE IN THE WORKSHOP

01 Clarify the expectation

What was agreed, and was the expected standard sufficiently clear?

03 Hear the perspective

How can we understand the employee's account without assuming causes?

05 Choose the response

Which response fits the evidence, policy and need for specialist guidance?

02 Examine the evidence

What observations show a gap, and what context is missing?

04 Explore support

What practical support or system change might enable better performance?

06 Review progress

When will we review progress, support and any unresolved questions?

The six prompts are workshop focus questions, not replacement PERFORM stages. Performance concerns may connect to capability, conduct, health or system barriers; use the relevant confidential process and qualified guidance rather than infer a diagnosis.

[Explore the full model >](#)

LEARN BY DOING

Explore. Challenge. Make the ideas useful.

Short explanations lead into lively exercises, paired discussion and small-group challenges. Participants test ideas, share experience and build a draft together. The tone is engaging and enjoyable, with time to reflect and connect learning to real work.

01 Replace the label

Participants rewrite judgemental statements as observable concerns, check the underlying expectation and identify where the available evidence is too weak to support the manager's initial conclusion.

02 Investigate the missing context

Groups receive a staged case pack, list competing explanations and request further information, then revise their response when workload, training or process facts change the picture.

03 Practise the first conversation

Triads rehearse a manager's opening, employee response and observer feedback, focusing on clear evidence, listening and an agreed next step without jumping to a formal outcome.

04 Build support and review

Pairs draft a short support record with expectations, responsibilities, resources and review points, then test whether the actions are specific, feasible and consistent with the case evidence.

DIAGNOSE BEFORE YOU ACT

Evidence > shared feedback > agreed priorities

Use selected diagnostic prompts to distinguish known facts from assumptions. Discuss the findings and agree their meaning before proposing a solution. Feedback is part of diagnosis, not an afterthought.

ONE CASE, DEVELOPED THROUGH THE DAY

A recently transferred coordinator has missed several dispatch deadlines. The manager describes the employee as careless, but the team changed scheduling software and informal training covered only routine orders. Other coordinators handle fewer urgent changes. The employee has not yet been asked about the pattern or the support available.

Groups prepare the initial conversation, identify missing context and draft a provisional support and review record, marking any question that needs HR or other qualified guidance.

THE FACILITATOR WILL

Invite different perspectives.

Make assumptions visible.

Welcome constructive debate.

Capture practical learning.



SAMPLE WORKSHOP AGENDA

A working day, with room to think.

09:00-16:30 | Six hours of facilitated learning, plus lunch and breaks. The agenda, emphasis and timings are always agreed with the client, including local scheduling needs.

09:00-09:20	Start with the actual concern Explore common assumptions about poor performance and practise separating an observable gap from labels about the employee's attitude or character.
09:20-10:15	Locate concerns within PERFORM Connect the concern to expectations, dialogue, support and review, using six workshop focus questions within the full seven-stage cycle.
10:15-10:30	Break
10:30-11:30	Examine evidence and context Work through staged case information, check the expected standard and revise possible explanations as new facts become available.
11:30-12:30	Prepare a fair opening Draft an opening that explains the concern, asks for the employee perspective and leaves room to correct incomplete information.
12:30-13:30	Lunch
13:30-14:30	Rehearse the conversation Practise the first discussion in triads and use observer feedback to improve clarity, listening and the proposed next step.
14:30-14:45	Break
14:45-15:30	Agree support and review Draft realistic support actions, responsibilities and review points, checking that the plan addresses the evidence and available workplace resources.
15:30-16:10	Check boundaries and records Review a factual note, recognise questions requiring specialist guidance and test the draft against supplied organisational policy boundaries.
16:10-16:30	Prepare for careful application Choose a practice or workplace conversation, identify the appropriate adviser and record what must be checked before proceeding.

Move from an observed gap to informed conversation, proportionate support and an agreed review of progress.

FROM THE SESSION TO YOUR DESK

Useful models. Practical working records.

The day combines reference materials with drafts developed in the exercises. Each has a clear use beyond the workshop; the work reflects the evidence and perspectives available in the room.

01 Concern description worksheet

A worked example turning a general judgement into a specific expectation, observation and work impact, with prompts for checking what was actually agreed beforehand.

Prepare a clear description before discussing a performance concern.

02 Context enquiry prompts

A question set covering clarity, capability, workload, resources and employee perspective, alongside reminders to seek appropriate guidance where health or other sensitive matters arise.

Explore plausible causes without assuming what explains the concern.

03 First conversation outline

A practised outline for explaining the concern, inviting the employee account, checking understanding and agreeing next steps, including notes from an observer's feedback during practice.

Rehearse an opening with an appropriate HR or management colleague.

04 Support and review draft

A case-based draft connecting the expectation to support, employee and manager actions, resources, review timing and questions that remain open for further enquiry or guidance.

Agree specific support and a proportionate point for review.

05 Factual recording checklist

A checklist for a concise conversation note covering relevant evidence, the employee perspective, agreed actions and outstanding questions, subject to organisational confidentiality and recording requirements.

Check that your record supports understanding and appropriate follow-up.

06 Referral and action map

A personal action map identifying the relevant policy, available HR or specialist support and the checks needed before using the workshop materials in a workplace situation.

Find the right guidance before taking a consequential next step.

CONTINUE EXPLORING

Continue with the models, diagnostic manuals and development resources on the HR Delivery website. Workshop exercises provide a first application; a full organisational diagnostic or implementation assignment can be agreed separately.

[Open the framework >](#)

[Explore diagnostic resources >](#)



MAKE THE LEARNING COUNT

A better conversation. A practical next step.

Participants should review the conversation prompts with their manager or HR adviser before applying them to a live concern. Begin with clearer expectations and proportionate enquiry, using established confidential procedures and specialist guidance where the situation requires them.

YOUR FIRST 30 DAYS

01

Days 1-7

Check policy and support

Review the workshop materials with an appropriate HR colleague or manager. Confirm the relevant process, available support and confidentiality expectations, then choose a suitable practice or application opportunity together.

02

Days 8-21

Prepare and listen

Prepare a factual concern description and check the evidence. Where appropriate, hold the first conversation, hear the employee perspective and agree support or seek guidance before deciding further actions.

03

Days 22-30

Review agreed actions

Review the support and progress at the agreed time, using the recorded expectation and relevant evidence. Update the actions or seek appropriate guidance where uncertainty or a continuing concern remains.

Follow-through is participant-led. Additional facilitation, a full diagnostic or specialist support can be agreed separately.

AVAILABLE IN-HOUSE

Shaped around your organisation

The client and facilitator agree the in-house day and relevant policy boundaries. Participants should review their performance support process and available advisory routes; use anonymised or fictional examples and exclude confidential details of live employee cases.

PLAN YOUR IN-HOUSE WORKSHOP

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Discuss your workshop



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