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Operating as a coach during a formal review

Off the job (outside the workplace) can be anywhere that provides a quiet, confidential environment. This is where the formal review takes place with each member of the team. There are some major considerations here in relation to the likely behaviour of the employee during the review.

It is important to consider the likely impact on each employee when they are taken out of their familiar and comfortable environment to one which is unfamiliar, and for some, perhaps frightening. Based on previous experience or simply fear of the unknown, employees often display signs of:

- distress;
- fear; or
- lack of trust.

Employees these days often convince themselves they are in trouble or are about to be made redundant. Many will find it difficult to accept that the review is a regular part of people management aimed at telling them formally how they are doing, how they can improve and reaching agreement on what assistance they will be given to improve and/or continue their individual development.

Each employee must receive feedback that is directly related to their performance and behaviour in meeting clearly defined expectations. The feedback provided will be in relation to excellent performance and underperformance – and guess what? There will be no surprises. The line manager will be using objective evidence that has been gathered from direct observation of both performance and behaviour on the job (in the workplace).

In operating off the job, the coach is reflecting with each team member on past performance. We have said much about the importance of evidence: to have any value, the coach must structure the evidence so that it is directly related to expectations.

Not all of the evidence needed to provide feedback on excellence or underperformance can be obtained by the coach moving day-to-day amongst the team whilst they work. Depending on the size of the organization and the scope of work activities (for example across shift), it may be necessary to consult with other line managers and to access attendance or other records. We say this evidence needs to be introduced in a particular way and relates directly to how the whole practice of performance feedback is introduced to the organization.

Figure 1.1, page 17, sets out the people management process, and lists four key features:

1. managing;
2. people;
3. performance;
4. development.

The first feature includes communication, which is about making sure everyone knows what is involved. This is where the role of the coach (line manager) must be made totally clear, in particular that the coach will operate on the job through constant informal reviews of performance, and off the job through a formal review process.

It must also be made clear that evidence of excellence and underperformance will be gathered progressively, based on interaction between the coach and all team members so that there will be no surprises. It must also be made clear that, in preparation for the formal review, evidence may come to light through objective means which the coach has not been able to raise with the team member directly. Our approach to dealing with this is that the first formal review is a benchmark review where the coach is clearly able to confirm judgements based on evidence already raised with the team member and, where new evidence is raised, it is set to one side for the moment. The coach might say, 'Jack, on reviewing your performance in readiness for this

review, I have confirmed you were absent on the following days. In view of our policy of no surprises, all we will do is discuss it and note it down as an area we will formally review in, say, six months.¹

Taking stock

We have said that a formal review is the process by which the coach provides feedback off the job (outside the workplace). Whilst we argue always that there should be no surprises during the formal feedback process, we also accept there may be! To respond, we say the employee must be given a fair go. The formal review process should begin with a 'benchmark' review where no final judgement is made on any new evidence of underperformance (or non-compliance to a code of conduct) introduced at that time. Through discussion, expectations can be reinforced and agreement reached that this particular underperformance (or bad behaviour) will be revisited at the next formal review, for which a timeframe needs to be established.

All formal reviews will focus on:

- Where are we now?
- Where do we want to be in six months?
- What plan do we need to improve?
- What other form of individual development should be considered?
- Implementing the improvement plan.
- Monitoring the progress of the improvement plan.

The conduct of a formal review is challenging: it requires attention to detail, total clarity in the evidence to be discussed, and needs to be carefully planned. To have any value, a review must be structured and presented in a logical sequence. The extent to which this happens is directly related to how well the evidence has been gathered and documented in the first place. Depending on the organization, we urge you to consider something we have learnt over the years: blue-collar workers, children and dogs can smell a phoney a mile off!

PROVIDING FORMAL FEEDBACK OFF THE JOB

Whilst it is not always essential, we generally recommend commencing formal feedback through a benchmark review. What then follows is a structured process that can be used for that purpose or the regular reviews that follow.

A decision on the minimum number of formal reviews should be made during the planning component of phase 1 (see [Chapter 1](#), pages 17–18). The key is that the frequency should be driven by the extent of underperformance of the employee. We have put in systems where the poorer performers are on fortnightly reviews, the better on six-monthly reviews.

The approach we will describe for providing formal feedback off the job is just one example of how it might be done. It will focus on examples of key activities on which feedback can be given, and can be adjusted, extended and customized for any organization, depending on the nature of the work. There can be combinations, but whatever approach is used it must relate to expectations in terms of performance standards and the code of conduct.

Before describing the approach, it is important to realize that not every area of competence required to perform a job can or should be listed. The feedback package of activities should be in clusters; for example, performance on the job covering:

- approach to tasks;
- execution of tasks;
- tools and equipment reliability;
- personal safety.

Alternatively, as another example:

- job planning;
- performance focus;
- occupational health and safety;
- operation of equipment;
- managing learning;
- designing assessment.

What is important is that it is a ‘big picture’ review, which must focus on all major areas of performance and behaviour. Our structure consists of two components, A and B.

Component A, Designing a structure for a formal review (feedback), consists of five steps, which deal with:

1. Determining the areas of competence and behaviour that feedback will be given on.

2. Indicators of performance.
3. The importance of rating scales.
4. Marking the rating scale.
5. Writing comments.

Component B, Conducting a formal review, consists of six steps, which deal with:

1. Planning the feedback session.
2. Preparing emotionally for the feedback session.
3. Conducting the feedback session.
4. Reaching an agreed result.
5. Recording the outcomes of the feedback session and planning continuous improvement activities.
6. Monitoring and evaluating the continuous improvement activities.

A: DESIGNING A STRUCTURE FOR A FORMAL REVIEW (FEEDBACK)

The importance of involving representatives of all key players has already been stressed. We would also stress the importance of validating all of the work produced.

Step 1. Determining the areas of competence and behaviour that feedback will be given on

These must relate to expectations. Some examples might be:

- job planning;
- time management (this is used as an example through Steps 2 to 5);
- communication;
- continuous improvement;
- occupational health and safety;
- equipment operation;

- teamwork;
- learning assessment and design;
- learner management.

These will vary in relation to the breadth and complexity of the work area (customer service and customer relations would be included for many jobs and organizations). We should make the point that the development of the performance criteria to be applied in respect of these expectations needs to be determined in the context of the organization. What sounds or looks subjective in one organization might be precisely what another organization wants (for example, works flexibly – moves between jobs as required).

Step 2. Indicators of performance

Write an over-arching statement that describes what is expected of employees in managing their time.

Time management

Makes most productive use of time by planning, working flexibly and working to job completion.

Step 3. The importance of rating scales

List the criteria (indicators of performance/expectations) on which evidence will be gathered and judgements will be made on compliance.

Time management

Makes most productive use of time by planning, working flexibly and working to job completion.

Indicators of performance

- Returns to task promptly after planned/unplanned breaks in work.
- Plans work – establishes priorities.
- At work station ready to commence before scheduled start time.
- Continues working until relieved in continuous work environment.
- Works flexibly (moving between jobs if required).

The coach must be totally clear about what evidence is required to apply these criteria.

Note: These indicators can be adjusted to suit the job and the organization.

Step 4. Marking the rating scale

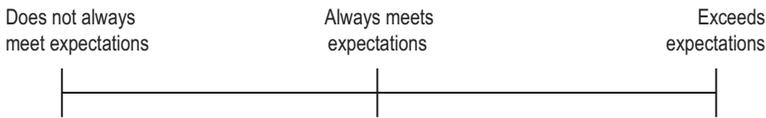
This requires a rating scale that clearly indicates the extent to which the criteria (indicators of performance) have been met. Here is an example:

It is critical the rating scale is clear and unambiguous. The rating scale should also be accompanied by a comments section, in which the coach can summarize his or her judgement of the employee. More is said on comments in Step 5.

There is a necessity with any rating system to facilitate 'moderation' meetings from time to time for coaches to compare notes on how the rating scale is being applied. This moderation process needs to be included in the basic training for workplace coaches.

Time management

Makes most productive use of time by planning, working flexibly and working to job completion.



Comments

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Indicators of performance

- Returns to tasks promptly after planned/unplanned breaks in work.
- Plans work – establishes priorities.
- At work station ready to commence before scheduled start time.
- Continues working until relieved in continuous work environment.
- Works flexibly (moving between jobs if required).

Step 5. Writing comments

The comments section should contain:

- examples of evidence in relation to either excellence or underperformance with dates and times if required;
- notes for reinforcing the expectations for this performance;
- points for discussion and agreement as to how underperformance can be dealt with;
- a preliminary plan for performance improvement.

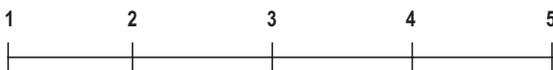
The importance of the rating scale

The clarity of the rating scale in relation to expectations (indicators of performance) cannot be over-emphasized. It is here much of the good work can be undone through rating scales that are subjective and far too open to bias or ambiguity.

A poorly designed rating scale can have a major impact on an employee's confidence. It can also lead to aggression, anger, downright rebellion or, worse, a refusal to participate by the workforce. An effective way of demonstrating a rating scale that is a serious worry and likely to find little support and a backlash, is through a contrived example.

Time management

Maintains punctuality and makes best use of time to plan work.



Negative indicators:

- job takes too long
- job site is left in a mess

Positive indicators:

- makes best use of available time
- is ready for work at start time

Areas for concern

You might like to make your own observations before moving on. Our concerns are:

- The criteria used for both negative and positive indicators are too brief.
- What is the difference between a rating of 1, 2, 3, 4 or 5 – for example, what are the degrees of compliance expectations?
- What does a 3 mean?
- The potential for employees to walk around the workplace talking in numbers about their own performance.
- Of even greater concern, employees asking their team mate, ‘I am a 3½, what are you?’

Marking the rating scale

Anyone involved in assessment will tell you that you must be totally clear on, a) the criteria you are using as evidence to confirm compliance to performance standards and code of conduct; and b) the evidence you have to confirm either excellence or underperformance.

The coach conducting the formal review must be totally sure of what the review requires, the evidence collected, and compliance or non-compliance with the indicators of performance. These things need to be in place before making a judgement on the extent to which an employee:

- does not always meet expectations;
- always meets expectations;
- exceeds expectations.

The coach must have no doubts – but be prepared to discuss matters openly with the employee. In some instances there may be insufficient evidence available to make a judgement. Once again, this is exactly why a benchmark review is important. The coach may have to say, ‘Jack, I haven’t seen enough of you to rate you in this area – so I will hold it over until our next review’.

Taking stock again

Since we last took stock we have discussed the role of the coach in providing feedback off the job (outside the workplace), in the first instance through a formal benchmark review. In many ways, this is a pilot or trial run to introduce the activity and ensure validity, reliability, consistency, transparency and acceptance of the process. Everyone involved in having a formal review of their performance must be very clear on what it is intended to achieve, and how it will be managed by the coach.

We provided guidelines for constructing a formal review package; in particular how work expectations can be documented, and how each employee will be rated against the criteria (indicators of performance) applicable to the expectations.

PREPARING FOR A FORMAL REVIEW

Before we move on to how the coach will conduct the formal review, there are a number of important links that need to be made from the design of the formal review package to its implementation.

One link is the importance of the coach providing every team member with a copy of the review package relevant to their job. Each employee must have sufficient time to once again familiarize themselves and to also rate themselves in relation to each of the expectations contained in the package. This is an imperative as it will ensure plenty of healthy discussion during the review. More importantly, it will ensure an interactive two-way review. Obviously the package should reflect the level and type of work being performed, and be as simple as possible.

The coach will find that some employees do not rate themselves highly and will be pleasantly surprised by the coach's judgement. On the other hand, a smaller number will see themselves operating at a higher rating. In either case, particularly the second, it requires the coach to be totally prepared.

The second link involves who should attend the formal review besides the coach and the employee. In many ways this is a strong test of how well the entire people management process has been introduced. Where there is suspicion or doubt on the part of the employees, they may ask their representatives to be involved.

From an individual employee point of view and regardless of whether unions are involved or not, the importance of involving the one-up manager cannot be overstated. In other words, to ensure fairness and even-handedness, an employee who knows that his or her manager's manager is an active participant in the process will be much more confident about the outcomes than if he or she thinks the judgements are purely the views of one person.

Another factor will be the competence and integrity of the coach. Reviewing an employee's performance requires a broad range of skills. Some of these are the competence and confidence of the coach to:

- communicate clearly;
- listen actively;
- observe thoroughly;

- handle difficult employees;
- manage conflict (in some cases);
- deal in facts;
- set realistic goals;
- support but provide team members with the freedom to initiate;
- turn mistakes into learning activities;
- act with honesty, integrity and patience (professionalism);
- build confidence;
- assist team members to overcome obstacles;
- facilitate learning and, where able, impart competence;
- create an environment for the team to motivate themselves;
- assist in continuous individual development.

Right now you are probably thinking, 'I've never met a line manager with all those attributes.' Neither have we, but this is our target! Also, of course, not all of these are necessarily used during a formal review and there are probably other attributes that are relevant.

The most important thing is that all coaches involved in the management of people are thoroughly prepared. This will include how to coach and provide informal feedback on the job using GIDAY, and how to coach and provide formal feedback off the job through a formal review. We deal with this later in the chapter.

In our experience senior managers generally believe their line managers are very good communicators and have the prerequisite competences to be a good workplace coach. Regrettably this is seldom accurate, hence the need for comprehensive training for all involved in this process.

On rare occasions it may be necessary for an HR professional to act in a coordinating role to assist the coach in the conduct of a formal review. This may include maintaining the integrity of the process and building competence and confidence in its application. For this to occur, the HR person must participate in the training and be competent and confident in acting as a coach.

We stress, however, that HR should not be involved in the process of performance review at all, other than to provide advice and assist line managers with any difficulties.

B: CONDUCTING A FORMAL REVIEW

Irrespective of whether the coach is conducting a benchmark review (pilot or trial) or the first formal review, it is important the review follows a carefully structured plan. For the purposes of explaining the structure, we will call it the 'feedback session'. The structure consists of six steps:

1. Planning the feedback session.
2. Preparing emotionally for the feedback session.
3. Conducting the feedback session.
4. Reaching an agreed outcome.
5. Recording the outcomes of the feedback session and planning continuous improvement/development activities.
6. Monitoring and evaluating the continuous improvement/development activities.

Step 1. Planning the feedback session

What follows in the next steps is really common sense; however, we all know what it is like to work with a manager who is weak on planning. In our training of coaches, we provide hard copy tools for ensuring a quality approach is adhered to. Here we give an overview of the critical steps that should form part of planning:

- Organize an environment that has sufficient space, is comfortable and interruption-free.
- Confirm and organize the attendance of all involved:
 - date;
 - time;
 - location.
- Confirm who is going to be there and what their role is to be – agree who will do the recording of discussion and outcomes.
- Pay serious attention to seating arrangements. Circles are less confrontational and friendlier than rectangular seating arrangements. It is worth remembering, a coach may require a one-up manager or HR person for

the provision of feedback, and the employee, a union delegate for support. Two soon turns to four, which becomes a crowd.

- It is important therefore that there is a strategy to communicate with any employee representatives and/or unions. It might be necessary to involve them in the training and convince them that this process is both fair and essential to the organization's well-being. Ideally they won't need to be present at the session but if they are, you need to have a plan for dealing with them.² Remember, the greater the level of suspicion, the more likely a dog fight. The feedback environment must be non-threatening.
- Confirm with the employee if, besides his or her own completed feedback package, there is anything else that needs to be brought.
- Review the feedback again. Remember, it is critical to:
 - focus on the job not the personality;
 - focus first on success;
 - clearly identify areas for improvement;
 - ensure there are no surprises.

Now the coach is ready to get his or her hands dirty!

Step 2. Preparing emotionally for the feedback session

This is the point reached after all consultation has been completed with other relevant line managers and the total formal review package has been completed for each team member. All rating scales must be marked and the comments section fully completed with:

- examples of evidence – excellence and underperformance;
- notes for reinforcing expectations;
- points for discussion and agreement as to how underperformance can be dealt with;
- preliminary plan for performance improvement/individual development.

A reminder: there should be no surprises in relation to evidence in any of the listed areas of expectation. If there is any new evidence that has not been discussed previously, the coach must introduce it but not rate it formally. All evidence must be documented clearly and completed with total confidence.

Preparing emotionally is thinking through the feedback to be given to each team member and making some early judgements about how the feedback is to be given and what the likely reaction will be:

- How will it impact on the employee?
- How will the employee react?
- How will you, the coach, react?
- How might a union representative react?
- How will anyone else present react?

If little attention has been given to the evidence in terms of validity, reliability and consistency and it is short on examples, the review is almost guaranteed to turn into a dog fight. 'Prepare or perish' is the message.

We have discussed the importance of transparency in the performance feedback process. Notwithstanding the level of communication and consultation, both employees and coaches will be apprehensive and nervous. So too will any representatives. A coach must plan carefully what he or she will say in the first few minutes. When training coaches in the presentation of feedback, we spend a great deal of time on specially designed role plays and scenarios that deal with a broad spectrum of likely reactions and behaviours. These role plays and scenarios are purpose-designed for each organization and reflect the culture and typical contents.

In summary, preparing emotionally for the feedback session is about profiling each employee involved in formal feedback and assessing likely reactions, and making a preliminary assessment of their individual emotional state on arrival. Dealing with underperformance is a challenge – a good reason to kick off the session with most of the positive feedback you have to offer!

It is worth remembering that the employee, and if applicable the union delegate, will be doing the same thing. In particular, they will be clearly determining the coach's perceived or demonstrated strengths and weaknesses. A word of warning: if there is evidence of underperformance in your own performance, you need to be prepared for how you will deal with it.

It is also important that this aspect of preparation does not take place just prior to the session. We argue quality time should be spent in the days leading up to the formal feedback sessions.

Step 3. Conducting the feedback session

Our approach to running the session throws up the following suggestions:

- Ensure there are no interruptions and do not commence until all participants arrive, preferably together, and do not keep them waiting.
- Speak professionally but in line with the language of the workplace (within reason).
- Put everyone at ease; explain the format of the feedback session and confirm everyone is ready to commence – make eye-contact with everyone.
- Focus on excellent performance first – gain acceptance by the employee. Do not patronize.
- Focus next, and gain acceptance by the employee, on underperformance:
 - focus on evidence – provide examples when required;
 - give the employee an opportunity to respond – encourage him or her.
- Commit the employee to do more of this, or less of that.
- Target any employee concerns or assistance required.
- Make it clear to all that you are trying to help the employee, for example through the provision of additional training/development.
- Gain employee commitment to improve.
- Encourage feedback from the employee about your performance. Have a structure for this, similar to the one you use with them. ‘What should I do more of/less of?’ ‘Please approach me on the floor if I am hindering you or I can do something to help you achieve.’

Remember, it is during this time your attention to detail in collecting evidence and completing the rating scales will win the day. There must be no doubt in your mind and you must be totally sure of what you have said and heard whilst conducting the review. Part of your planning should have determined what recording was to be done and by whom during the feedback session.

Training provided to coaches must focus on the acquisition and application of both competence and confidence. Once again, our approach is hands-on – using case studies and scenarios that escalate from a commencement point with built-in hand grenades thrown in to expose the coach to a wide range of difficult situations. This includes aggressive behaviour from the employee and even higher levels of aggression from the employee’s representative. It

also includes scenarios involving the HR person and the difficult role he or she sometimes has. This allows all participants in the training to see various ways of dealing with poor conduct. Those who play the roles must adopt the behaviours of someone who intends winning at all costs.

In conducting the formal review, the coach must be prepared to deliver a strong disciplinary message from time to time. It may be that the coach ultimately has to tell the employee in the strongest possible terms that he or she has not performed to standard and this is what he or she has to do about it – ‘You must lift your game by doing/not doing the following’ – be specific!

Chapter 7 will deal with how the coach moves from a coaching role to a disciplinary role as a prelude to the road to goodbye.

Finally, as in the case of any situation where evidence is presented and discussed, there comes a point where a verdict has to be reached. The verdict in a formal review is where the coach has presented the individual evidence and the employee and coach have agreed to:

- the ratings on each of the areas of expectations;
- what is excellent performance;
- what is underperformance;
- what specifically needs to be improved/developed.

Step 4. Reaching an agreed outcome

Reaching agreed outcomes is a critical step in the performance feedback process (closing the deal). It is the culmination of all the hard work in:

- collecting the evidence and examples;
- planning the feedback session;
- preparing emotionally;
- conducting the feedback session.

There is a skill in reaching agreement. Any salesperson will talk of the importance of closing a deal. The acquisition and application of this skill must be part of the training provided to coaches.

We believe a telling way to illustrate this process is through the things a hard-nosed coach in the world of underground mining did to ensure he was able to reach an agreed outcome with each of the employees in his team. The words are as he stated them, and can be amended to suit any work environment:

- Really know your people.
- Tell people the truth, not bullshit – it must be the way it is.
- Plan carefully what you will say and how you will say it. People will be apprehensive, tense and nervous.
- Take time to put people at ease.
- People can be surprised at how you rate them. Your ratings may not match their own.
- Your first rating of people will turn out to be close to the mark.
- Evidence used must be accurate.
- Never change your ratings during an interview (pass on it and come back to them).
- Unless you have all the evidence, don't argue a point – come back on another day.
- You must know and articulate clearly to an employee what is required (expectations) in order to improve performance.
- Set and stick to improvement/development plans.
- The employee must be encouraged to provide feedback to the team leader about what he or she should or could do to assist the employee improve/maintain/develop his or her performance and agree to act on it.

Once the outcome has been agreed to, the coach and employee can jointly map out an improvement/development plan.

Step 5. Recording the outcomes of the feedback session and planning continuous improvement/development activities

This stage is about confirming joint agreement in areas to be improved and how it will be done. The focus is then on a coaching plan that addresses the area(s) that must be improved. It might also be development as part of preparing for future changes in work responsibilities.

One area agreed for improvement might be behaviour (code of conduct), for example, absenteeism or punctuality. It may include housekeeping or the use of personal protective equipment. For a teacher it might be the return of assignments in a timely manner and a greater level of written feedback. This

coaching plan is not too involved, rather an agreement to change behaviour. This agreement must be monitored by the coach.

On the other hand, an area for improvement might relate to competence to do the job; the inability to meet a standard, which ultimately means training is required. Where this occurs, the coach will need to prepare a coaching plan that focuses on training and further development. This coaching plan might involve all team members. It may be characteristic of all team members.

The training and development might emerge from an increase in rework, the inability to troubleshoot, or may relate to new equipment. It might also relate to operating a computer for maximum potential or developing and presenting proposals/reports.³ It might be to deal with student complaints or class/subject dropouts.

This coaching plan requires a clear specification for learning and assessment and is completed over time. This is a more formal agreement, which must be monitored by the coach.⁴

Whatever the focus of the coaching plan, there must be agreement on what needs to be improved, how it will be improved, and an agreement by the coach and the employee to meet at a set time in the future to review progress and confirm compliance.

Planning continuous improvement activities should:

- set clear objectives;
- establish and agree on priorities;
- set and agree on timelines;
- target the coaching assistance required and how learning will occur:
 - mentoring,
 - formal training,
 - work shadowing (spending time with a top performer),
 - job rotation,
 - exchanges,
 - projects;
- target resources required;
- complete individual and team coaching (development) plan;
- set a date for the next formal feedback session;
- sign off on the coaching plan.

Coaching plans must be specific and clearly note:

- areas for improvement;
- action to be taken;
- resources to be committed;
- date to be commenced;
- date for completion or review.

They must be signed off by all involved.

All coaching plans should be accompanied by a clearly set out timetable for future reviews. In the case of a benchmark review, it should be accompanied by follow-up reviews.

It must be stressed that this stage underpins the integrity of the entire formal feedback process. It is where the coach and the organization demonstrate their commitment to the continuous improvement/development of all employees. It should be very easy for a coach to tell someone they have performed excellently. It is another matter when time and resources have to be committed to addressing underperformance. This is where the commitment is tested. A lot of organizations are not great at maintaining the momentum and seeing things through to the end.

The coach has one more critical step to pursue.

Step 6. Monitoring and evaluating the continuous improvement/development activities

Action, we are told, speaks louder than words. Words written on a coaching plan might read and sound good, but without action they are meaningless. Often the coach may have to hand over coaching/development plans to someone else, such as a training department. The coach must 'ride shotgun' in these instances.

Where behaviour is involved, it means following up commitments to improve. Where competence is involved, it may mean using a skilled operator to assist in learning and ultimately assessment.

This stage requires the coach to:

- ensure the coaching/improvement/development plan is implemented;
- check on progress in meeting objectives and timelines;
- target and deal with any difficulties in achieving the coaching plan;

- provide support and encouragement;
- continue informal on the job (in the workplace) feedback and coaching;
- organize and conduct formal off the job (outside the workplace) feedback and coaching.

This stage requires continuous vigilance of both normal work activities and development activities. It must be part of the everyday coaching role of the line manager.

In addition, the coach will need to provide concrete examples of improvement in job performance to senior managers. This might be through:

- reduction in lost time injuries;
- reduction in rework;
- reduction in absenteeism;
- improved morale;
- improved throughput of product;
- reduction in customer complaints, or return of product;
- reduction in student complaints/withdrawals.

As stated earlier, the line manager's performance improvement/development plan will be inclusive of all of the activities contained in the individual coaching plans. Some of these can have monetary values put on them over time; greater attention will be given to this in [Chapter 8](#).

A final but important point needs to be made as we conclude this chapter. Where the coaching plan relates to unacceptable conduct, the price of continued non-compliance must be communicated to the employee at every stage of coaching – 'If this behaviour continues you could lose your job.' This is the message they have to hear.

Taking stock again

In the last three chapters covering workplace coaching, we have moved through a series of stages:

- Setting the scene for workplace coaching.
- Getting the right people on your team.
- What is workplace coaching?

- Workplace coaching in action.
- Operating on the job (during work activities).
- Operating off the job (during a formal review).
- Designing a structure for a formal review.
- Marking a rating scale.
- Conducting a formal review off the job.

We do not believe all line managers have the kitbag of competences required to engage in workplace coaching as part of managing people. The next chapter deals with our learning approach to preparing line managers to do this competently and confidently.

NOTES

1. Theoretically this should not happen. If the attendance policy requires certain things they should be built in to the day-to-day feedback – the employee should have been challenged on his or her return from the absence.
2. Unions and employee representatives should be advised that there is a process for dealing with grievances if anything untoward is said to have occurred in the process.
3. The culmination of the individual/team coaching plans should take the line manager to the point where he or she can develop a performance improvement plan for their area for submission to their manager.
4. For higher level managers who have predetermined Key Performance Indicators (KPIs) and Key Result Areas (KRAs) in respect to their area of management, the performance improvement plan will highlight the actions to be taken by the manager to achieve the turnaround in performance needed.