

THE **ULTIMATE** GUIDE TO MANAGING YOUR **TEAM'S** **PERFORMANCE...**

WHETHER THEY'RE IN THE OFFICE OR NOT



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Covid has changed the way that people all over the world work. The sudden move to home working, for many of us, worked out well. We found that after an initial period of adjustment, there were some benefits to be had for all.

Even now, it still remains to be seen how permanent these changes will be. There's been a lot of back and forth from some of the world's biggest companies. Smaller businesses are likely to follow suit. But perhaps this change to home or hybrid working has worked well for you, and you've already made the decision to stick with it. Maybe you're still making your mind up.

Whatever the situation for your business, one thing is clear: the way we manage our teams' performance needs a little adjustment. This guide will highlight everything you need to know to get the best out of your people, to keep them happy and motivated, and how you should manage under performers out of your business, wherever they're working from.

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THE HYBRID TEAM

We're hearing loads of new terms surrounding the way we work. The hybrid team is one of them. Simply put, it means a team that is splitting its time working between both an office location and remotely. That could mean you have some people working full time in the office and some full time at home, or maybe people who come in for a day or two a week and work the rest from home... Basically, whatever the split, if you have people doing both, you now have a hybrid team.

When you have a hybrid team, some things will need to change. And not just the amount of time you spend on video calls.

The first thing you'll need to do is check your policies around hybrid working. Have you set out exactly what is expected of your hybrid workers. For example, will they be required to spend a minimum number of hours in the office? Can they pick and choose when and where they work from, when they feel like it? And how will you manage requests for hybrid working? Will everyone have the same opportunity or are there roles that need to have a physical presence?

There's a lot you need to consider, and a lot that needs to be communicated to your team about this. By setting out a clear set of principles that could be included in several formal policies you leave nobody in any doubt over what's expected of them.

It's likely you've already seen some of the problems that come along with home working? When you don't see all of your team as regularly as before, it can be easy to assume that everything is going well when, in reality, someone is struggling. The issue here is that it can become more difficult for problems to be communicated when there is less face-to-face contact.

It's really important that, as a manager of a hybrid team, you continue to treat everyone fairly and make time to meet with your people as you usually would. Ensure that everyone in your business knows that, just as they would in the office, communication channels to you and/or line managers are always open. Let everyone know the best ways to voice concerns or complaints, where to go to ask questions, and who to speak to should they have any problems. By outlining clear instructions, you make it easier for them to approach you. And, if you find that some employees are quieter than usual, make time to check in on them, just to be sure.

RETHINKING HOW YOU MANAGE PERFORMANCE

If you're not seeing all of your team every day, it can make performance review and management a little trickier. We're lucky that we now have more technology than ever to keep us connected and make conversations - almost - as easy as they would be in the office.

But, when it comes to reviews and appraisals, we need to put in a little more work to keep things flowing. That also means looking at the metrics we're currently using to measure performance. Start to think about output, quality and speed of delivery.

There are three core areas you need to look at when it comes to measuring performance levels; your work, your team and your customers.

The details can differ for each team member if they need to, but it's important that each new measure is easy to record and monitor, and doesn't place any additional workload on your people. Remember, a collaborative goal is just as important as an individual's goals - especially in cases where you have a hybrid team, as this can be an indicator of how well your new flexible working policy is going.

As a side note, make sure that all of your managers know exactly what measures of success you're looking for, and what success actually means for you. This could be anything from attracting new clients, to ensuring that everyone is taking regular breaks and clocking off when they should.

Contrary to what we might believe, rather than working from home leading to people slacking off, it's actually driven a rise in presenteeism. That is, people working when they're ill, working more than their usual hours, and failing to switch off when they need to or should. Keep an eye on exactly what hours your people are working and approach the subject with anyone you see struggling to fit everything into their day, and make sure it is still working both for them and for you as a business.

Regular appraisals and 121s are essential for keeping a happy, motivated and goal-oriented team. Set out exactly when your people can expect to have their 121s and with whom they will have them. We would recommend that 121s happen once a month or at least once every other month to keep everyone accountable and to keep lines of communication open. But also make sure that you have regular operational meetings and team talks to make sure the work is on track and there are opportunities for colleagues to help one another and work collaboratively.

Depending on how you want to appraise staff will depend on how quickly things move in your business. Again, formally arrange these meetings so that everyone knows what to expect and when. Appraisal systems can vary and it can feel time consuming in a small business so you may want to adopt an approach like Instructional Coaching setting quarterly goals that can be broken down into monthly or even weekly outputs with clear measures of success. You may find that new or less confident staff need more check-ins than your more established or competent colleagues.

Most importantly what ever approach you take train all of your line managers in holding effective review meetings. This will not only make it more realistic that reviews will happen when they're supposed to, but it will also mean that reviews are doing what they're supposed to do - encouraging your people to set and achieve new goals and targets. It is important to ensure that everyone is happy and has no issues with their role or their colleagues and that it generally opens up an effective time to communicate in private.

Don't forget that every review should have an element of goal setting. This is to help your people stay focused on what they want to achieve, to help them grow their skills and knowledge, and to allow them to 'move up the ladder' in your business, if that's what they are looking to do.

Every goal you set in any meeting should be a SMART objective. As a quick reminder, that means they should be:

Specific - What exactly is the goal and why is this goal being set?

Measurable - How will you know when the goal has been hit?

Achievable - Is it realistic based on everything else this person has to do?

Relevant - Will hitting this goal make a difference to their role or your business?

Time-bound - When will this be achieved by?



NEW STARTERS

Hopefully, your business is still going from strength to strength and, at some point, you will be looking at taking on new people. This may be new people to grow the business, or to replace people who have left you.

With all of the changes to the way we're working, it's equally important to be mindful of how you attract and onboard new talent.

First things first, when it comes to advertising a role, it's vital that you create a detailed job description before you do anything else. This allows you to identify exactly what you need in a new employee, the skills, knowledge and experience you'd like them to have, and it gives you a clear understanding of what they'll be doing day-to-day. It will also help to filter out any time wasters from your recruitment process.

When you do find the ideal candidate, it's important that you have a thorough onboarding process set up ready to go on their first day. Make sure you have everything ready for them to hit the ground running, including a device to work on (in the office, at home, or both), that they have accounts set up in all of the software they'll be using, an email account is ready to go, and that they also have anything else they'll require to carry out their role effectively.

Include a full training itinerary allowing them time to become familiar with software, to shadow any other employees, and to see how everyone else's jobs fit into the bigger picture too. It's also a good idea to build in time for a guided tour of your offices, whether they'll be working in them or not. It all goes towards giving off a great impression of your business, and helping them to feel welcome and included from the get-go.

Now to the not-so-nice side of bringing in new people... what if it doesn't work out?

This is exactly what a probationary period is for. Use it!

A probationary period works to protect your business from a bad hiring decision, giving you time to see if your new hire is right for your company, and the role they've been hired to do.

From a legal standpoint, the day a new hire starts, whether they're subject to a probationary period or not, is the day that their full contractual rights begin. You will need to include any terms of a probationary period in their contract of employment, making it clear that certain terms will only apply once they've successfully passed any such period or frame of time. It's also vital that you include information on whether a probationary period may be extended within the contract, too.

Though there are no rules to the length of a probationary period, it's expected that an employer will be reasonable. Typically, a probationary period is no longer than six months (though you may wish to include a term that states it may be extended if necessary) for a new hire, and three months for an employee changing roles within the business.

During this period, you need to make clear what your expectations of your new employee are, the values and behaviours that must be displayed, and any standards that must be adhered to. A series of review meetings should also be scheduled during this period, where both parties can raise any concerns they may have and review performance levels.

If things don't work out for either party, it is an easier process to terminate employment during a probationary period.

Once an employee has been continually employed with your business for two years, they are entitled to claim unfair dismissal. If they've worked for less than this time, an employment tribunal will add their notice period to their length of service (unless they were let go for gross misconduct). Your employee is also within their rights to request a written document detailing the reason for dismissal. We would suggest that you always seek professional HR advice before you start any termination process.

Another thing to be mindful of is that any employee, regardless of how long they've worked for you, can claim for unfair dismissal if they have a protected characteristic. As a reminder, these are age, disability, gender reassignment, marriage and civil partnership, pregnancy or maternity, race, religion or belief, sex, or sexual orientation.

UTILISING TECHNOLOGY

As I've already mentioned, one thing that really flourished thanks to the pandemic is technology. We've been furnished with all the tools we could possibly need to work remotely, without disruption to our communication and collaboration. We couldn't have managed this well even 10 years ago.

So, while you're embracing video calling, file sharing and virtual offices, it's also time you looked to other forms of technology to make your working life easier.

There are countless HR software packages available to help you keep track of all of the aspects that come with employing people. Things like holiday requests, sickness and absence, meeting and appraisal notes, and personal information can be stored and managed within one app.

But there are other apps that you can use to help manage your peoples' performance, too. Project management software can help you to see exactly how well projects are progressing, how communication is handled and how much each member of the team is contributing.

There are also time management apps that allow you to track the times spent on tasks, showing you whether your people are using their time effectively, and reporting software that can send you automatic reports daily, weekly, or monthly.

When it comes to performance reviews, this kind of data can be very valuable.

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HANDLING UNDERPERFORMERS

There will undoubtedly come a time when you have to deal with underperformance in your business. Whether that is a whole team's performance or an individual's will dictate how you deal with such an issue.

If a team is underperforming, it may be a sign that your managers need to up their game.

However, if an individual is underperforming, you need to tackle the issue immediately and follow a specific process to fix the problem.

If you've been carrying out your reviews and appraising as usual and they haven't had an impact on your underperformer, it may be time to signal that you are moving towards a more formal improvement plan. This is a process that should manage your employee's performance in greater depth than regular reviews do. You will need to set a series of performance improvement goals and set out steps that your employee must complete in order to meet those goals.

You may decide to use the review template in place and add more regular check-ins.

However if you haven't documented anything then a typical performance improvement plan would involve you meeting with the employee and starting a conversation to highlight the performance issue(s) and to set out how they should improve. You should discuss what they think they should be doing better, and you can let them know your expectations. This should all be documented formally, with a copy being kept by both parties. Include these sections on the document:

- Employee's name, position and the date
- Manager's name
- Performance issue or concern
- Expected improvement actions
- Support and dependencies
- Due date
- Manager's comments
- Employee's comments
- Sign and date (both parties)

Then you will need to hold progress meetings to see what improvements are being made and whether the plan is being adhered to. You should also include on the plan:

- Progress summary
- Outcome
- Comments
- Next steps

Hopefully, after completing this process, you will see a marked improvement in your employee's performance. However, in some cases you may not. Then it may be time to take further action.

DISMISSAL ON THE GROUNDS OF CAPABILITY

Sometimes, unfortunately, it's necessary for you to dismiss an employee on the grounds of capability.

You may find that someone doesn't have the right aptitude or skills to complete their role effectively. Hopefully, you'd find this out while a new starter was in their probationary period, making it easier for you to remove them from the business. However, in some cases, perhaps where a role has changed or developed over time, this may happen with a long-term employee.

It may also be the case that the employee has become unwilling or reluctant to do their job - and this can be for any number of reasons.

In any case, it's important that you still follow your disciplinary or capability policy and dismissal procedures to the letter, to demonstrate that you've acted reasonably and fairly, and to avoid any legal proceedings in the future.

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WELLNESS AND INCENTIVES

A lot of people perceive managing your team's performance as, well, a bit horrible. But it doesn't have to all be doom and gloom. Not everyone will have issues and, if you're doing things the right way, it should be the case that you have a team of happy, motivated individuals.

One thing that you should be mindful of, especially when it comes to performance, is the wellness of your people, and the incentives you're giving them to perform well.

You've probably noticed that since the pandemic began, our wellness has taken a huge hit. Covid burnout became an issue for even the most resilient among us, and it was no surprise.

But, again, it's worked out to be a good thing in a sense, because it's forced many businesses to place more importance on the wellbeing of their people. And the result of this can be a happier, more motivated and productive workforce. Look after your team and they'll look after you.

Speak to your team - perhaps your 121s would be a good time to do this - and find out what it is that they work for. You might be surprised that for many people money isn't the primary reason for working. Of course, it's something we all need to live, but it might not be the thing that motivates them most.

If you're looking to give your employees perks and incentives, look at alternatives to money, such as gym memberships, extra time off, or even vouchers towards something they've been saving for. Ask the right questions and you'll soon learn what drives them, and therefore what the best reward would be for them hitting targets, goals, or even just doing a great job on something.

When it comes to wellness, encourage time off, taking proper lunch breaks, and switching off from work at the right time. If you spot signs of anyone struggling, or someone comes to you with a mental or physical health problem, take them seriously and demonstrate that yours is a business that values its employees' wellbeing. This kind of thing can really make or break a business when it comes to employee loyalty.

And remember, if people are working away from the office, they'll still need an element of communication to keep them happy and healthy. Check in on everyone from time to time, and make it clear that, even though people may be working at home, they are still able to speak to you at any time if they need to.

NEED SOME EXPERT HR ADVICE?

If you're dealing with employee performance or not sure what to do, we'd love to help you. Simply give us a call or drop us an email to arrange a conversation.

Simply contact our team on **01158 372 772** or sign up for our legally compliant **Capability Procedure and Guidance** notes at [PrimeHR.co.uk](https://www.primehr.co.uk).

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