

Performance Checklist

The Performance Checklist from *Coaching for Excellence* is a super tool for ensuring that you've provided your employees with the skills, tools, resources, and directions to do the work. Before coaching or problem solving (corrective action), it's important to first determine if employees have what they need to perform:

1. Have I defined the job description and skills required to do the job? Do I know what I expect from a person — any person — in this job? I must be clear about what they are supposed to do and what skills are required to perform.
2. What is the specific difference between the present performance level and the desired performance level? This question helps identify the performance gap. Current performance may be unacceptable and you want the employee to be performing at an acceptable level. Or current performance may be acceptable and you want the employee to be performing at a superior level.
3. Is the difference important? Effective managers coach employees on meaningful, important behaviors. If the performance gap isn't important, work on a behavior that is.
4. Define the impact the performance gap has on:
 - Me — How, specifically, does it impact your job or you?
 - The employee — In what way is it preventing advancement, losing sales, alienating customers, etc.?
 - The department or team — How is it reducing department productivity, efficiency, morale, or how is it preventing the department from excelling?
 - The organization — How is the organization effected? Is its reputation at stake? Is precedence being set?

Performance Checklist

Before conducting a performance management session, answer all of the questions about the employee and the situation.

1. Have I defined the job description and skills required to do the job? Yes No
2. What is the specific difference between the present performance level and the desired performance level? _____

3. Is the difference important? Yes No
4. Define the impact the performance gap has on:
 - Me:* _____
 - The employee:* _____
 - The department or team:* _____
 - The organization:* _____
5. Is my performance standard realistic? Yes No
6. Does the employee know what is supposed to be done and when? Yes No
7. Are there positive consequences for positive performance? Yes No
Are there negative consequences for poor performance? Yes No
Describe the consequences: _____

5. Is the performance standard realistic? Or am I — or the employee — expecting too much?
6. Does the employee know what is supposed to be done and when? Similar to — but more specific than — Question #1.
7. Are there positive consequences for positive performance? Positive performance should have rewards. Does it? Describe the consequences.
8. Is the employee willing to do the job? If no, why not? Employees will not perform if they are not willing. The employee may not understand the significance of the task.
9. Is the employee able to do the job? Employees will not perform if they don't have the ability. Does the employee have adequate resources? If no, what specifically does the employee need? If there are obstacles affecting performance, can the employee overcome them on his/her own? If no, what are the specific obstacles and how can I help remove them? Does the employee have the skills to do the job? Do I have the time it will take to sufficiently train and orient this person?
10. Have I been giving high-quality feedback?
11. What specific behavior will I seek to change? What feelings and beliefs may be causing the current behavior?

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8. Is the employee willing to do the job? Yes No
If no, why not? _____

9. Is the employee able to do the job:
Does the employee have adequate resources? Yes No
If no, what specifically does the employee need? _____
Can the employee overcome obstacles affecting performance on his/her own? Yes No
If no, what are the specific obstacles and how can I help remove them? _____

Does the employee have the skills to do the job? Yes No
Do I have time it will take to sufficiently train and orient this person? Yes No

10. Have I been giving high quality feedback? Yes No

11. What specific behavior will I seek to change? _____

What feelings and beliefs may be causing the current behavior? _____

Use this Performance Checklist with your own employees (or yourself) to determine if there are any elements missing that may help improve performance.

The Performance Checklist comes from *Coaching for Excellence* in Entelechy's *High Performance Management* program. Check out this module as well as our 40 other modules, training tools, and eGuides at www.unlockit.com.

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1. Have I defined the job description and skills required to do the job? Yes No
2. What is the specific difference between _____ the present performance level and the _____ desired performance level? _____

3. Is the difference important? Yes No
4. Define the impact the performance gap has on:
Me: _____
The employee: _____
The department or team: _____
The organization: _____

5. Is my performance standard realistic? Yes No
6. Does the employee know what is supposed to be done and when? Yes No
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Describe the consequences: _____

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8. Is the employee willing to do the job?

Yes

No

If no, why not? _____

9. Is the employee able to do the job:

Does the employee have adequate resources?

Yes

No

If no, what specifically does the employee need? _____

Can the employee overcome obstacles affecting performance on his/her own?

Yes

No

If no, what specific obstacles and how can I help remove them? _____

Does the employee have the skills to do the job?

Yes

No

Do I have time it will take to sufficiently train and orient this person?

Yes

No

10. Have I been giving high quality feedback?

Yes

No

11. What specific behavior will I seek to change? _____

What feelings and beliefs may be causing the current behavior? _____

