

Managing Employee Performance Issues

Employee performance issues are a challenge all managers face at one time or another. Whether it's an individual's interpersonal conflict with a coworker or repeated errors in financial reports, these situations can potentially affect others in the accounting department and company. If you are confronted

with a performance issue, you need to take appropriate action to ensure your team stays on track.

Some problems are so severe you should consider immediate termination of employment. In less serious instances, however, there are steps you can take to help staff members improve their work and meet standards.

Keep in mind that most employees want to succeed in their positions. Frequently all that's required is guidance and coaching to help someone recognize the problem and improve performance. In some cases, however, a more well-defined strategy may be required.

Give the benefit of the doubt
Before you confront someone, take an objective look at the situation. Consider whether the individual has had all of the necessary resources to succeed. For instance, did the staff accoun-

tant who's struggling with Microsoft Access claim to be proficient with the application when she was hired? If she required training, was it provided?

Also make sure the team member was given a detailed job description for his or her position that clearly outlined expectations. Evaluate all documentation to determine whether the employee was even aware of the standards.

This brief initial analysis can often uncover the source of a particular problem and help shape the response. If

there is no clear reason why an individual is failing to meet expectations, try to reserve judgment until you've had a face-to-face discussion with the employee.

Take action
After evaluating the situation, schedule a private meeting with the accounting professional to review your con-



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cerns. Don't wait until it is time for a formal performance review for this discussion; it's important to take action immediately so the behavior can be corrected without delay. Otherwise, you could unintentionally send the message to all employees that poor conduct is acceptable.

When discussing the problem, be as specific as possible. For example, instead of saying, "You're failing to meet deadlines," try: "Your budget analysis was two weeks late, which delayed our department's tax planning efforts."

Allow time during your meeting for the employee to respond to your comments. There may be issues you're not aware of that can help explain the poor performance. Take notes throughout the discussion that you can include in ongoing files documenting the accountant's conduct at work. This information can be helpful when preparing annual reviews or should the individual challenge a decision.

Develop a collaborative strategy

Provide an opportunity for the staff member to take personal responsibility for his or her behavior. Involve the accounting professional in developing a plan for improvement, asking for possible solutions to correct performance issues and a timeline for completion. For example, a senior accountant who has trouble conveying financial information in written reports might suggest a class in business communication.

If you suspect the individual may not be challenged enough at work, look for ways to counteract boredom. Ask about career goals, and



outline ways to achieve these objectives. At the same time, be careful not to be too accommodating. If it appears you're rewarding an underperforming employee, you risk alienating other accounting staff that meet expectations but don't receive special treatment.

Provide support

As the individual strives to improve, make a particular effort to be available to answer any questions and provide guidance. If you know you're going to be especially busy or hard to reach during the time of the improvement plan, let the employee know and check in periodically to make sure he or she has the resources needed to succeed.

You may find it useful to pair the underperforming staff member with an experienced accountant in the department. The mentor can provide instruction or advice, depending on what's required. Just be sure to partner accounting professionals that are compatible so they'll be able to build rapport and trust quickly.

Give feedback

Let the employee know how he or she is doing in meeting the objectives outlined in the improvement plan. Offer praise when the individual achieves goals, even minor milestones. Words of encouragement—such as a personal note saying "Great work!"—can go a long way when someone is trying to overcome a performance issue.

If problems persist, however, you'll need to schedule another one-on-one meeting. Provide a memo outlining areas that still need improvement, and issue a final warning. Always consult your human resources representative or legal department at your company for advice on how to manage the situation.

Addressing employee performance issues is never an easy process. But with patience, persistence, and a clear strategy you'll find that many situations can be turned around. In the end, you'll help maintain a team of productive, contributing accounting professionals. ■

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