**Coaching Out [Sample Script]**

*In this sample, the staff member (a director of technology) has been a loyal, well-intentioned employee whose skills no longer make sense for the evolved position. The manager’s preference would be for the staff member to begin looking for a better-fit job, but they are open to going down the* [*performance improvement plan (PIP)*](https://www.managementcenter.org/resources/performance-improvement-plan-toolkit/) *path and believe there's a chance the staff member can be successful.*

***Therefore, the core of the manager’s message is:***

1. *The demands of the role have changed and you may not be a good fit for it anymore;*
2. *You can choose to pursue the performance improvement plan route; but*
3. *I think the alternative route makes the most sense.*Be clear up front why you're having the conversation and what you will discuss.

As I mentioned to you, I’d like to talk about concerns I have about your fit for the director of technology role as it has evolved. **I want to share my thinking, get your perspective, and offer two ways to move forward.**  Acknowledge the employee’s strengths. Don’t do this to soften the tough parts of the conversation; offer it to show you see the whole person and their inherent value beyond the specific problem area you’ll discuss.

**Let me start by saying that I know how much work you’ve put into this job over the past two years.** On a number of occasions, you’ve gone above and beyond. You’re been great at paying attention to every detail, fixing problems as they come up, and watching the bottom-line. In our early days, you did amazing work negotiating with vendors. Your attention to detail, ability to look at staff computers and diagnose what’s wrong and fix it quickly, and your understanding of finances are real strengths.

**As you know, as our organization has grown, what we needed in our director of technology role has evolved.** We used to be a small, single-site shop, and now we have multiple locations. As we’ve added new programs, our database development needs have increased tremendously. We have a huge demand for new applications from the database, and those are things we have to do if we’re going to maximize our impact as an organization.Tell the story of how and why the role has evolved, and what the new bar is.

When I realized three months ago that we needed our director of technology to do a different set of things than we needed earlier, I came to talk with you. We discussed what we needed and why, and I asked whether you felt like this role, in its evolution, was something you could (and wanted to) level up to. **Before I share my take on the last three months, I’d like to hear from you. How have you been feeling?**

Thanks for sharing your thoughts. **I was excited that you were up for the challenge and I was impressed by your willingness to try.** Over the last three months, I’ve observed you putting effort into growing your skills by attending a database management training, learning about our program team in 1-1s, and jumping into projects to get hands-on experience. Anything else I’m missing?Recognize the efforts this person has made to meet the bar.

**Unfortunately, I’m still not seeing significant demonstration of the key requirements for the role**—things like big-picture conceptualization, ongoing communication with the program staff about their needs, and project management. For example, take the other day when we met with the online advocacy team about their strategic plan. We need someone who can sit in that meeting, gauge what the team is trying to accomplish, translate it into a set of technological solutions, and then explain the options in plain terms so they can make an informed choice. Once they’ve decided, we need someone who can manage the complex development process with our staff members, account for setbacks, and deliver a product that meets everyone’s needs.

**To be honest, I don’t think those are your core strengths.** For instance, when we tried to develop the new subscriber database, there were quite a few issues, including the team misunderstanding what you were going to deliver, and missing the final deadline. I realize that there were problems on both ends of that process—and I’ll address those separately—but even when the other team isn’t performing perfectly, I need someone who will communicate the issues, help them understand what they need to do, and manage them to their deadlines. I think that’s a high bar, but it’s also critical because our team and projects are rapidly growing in size and complexity. As I mentioned already, I definitely see your efforts and strengths in other areas; my concern is about your fit for this specific role.![Share specific examples. Be clear about the areas that need improvement and define the bar you need them to meet.
]()![If you are willing to develop a formal improvement plan and really believe it could work, note that.
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**How is all of this landing for you?** Do you feel like I’m accurately capturing our past conversations?

**So where does this leave us? I want to discuss two paths we could explore.** As you know, we have a formal process for staff members who aren’t meeting expectations, and that would be our **first option.** I want to be clear that this is a real option—if you choose to go this route, I’ll work with you to set clear expectations and support you to develop your skills. **It might be a challenge, but I think you could meet the bar for performance if you work really hard.**![Lay out the next steps according to your organization’s policy (remember: this is just a sample!)
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This meeting would be the first step in that process—this would be the **informal performance warning**, and we’d talk about how we’d know over the next three weeks if your performance had improved. After that, if your performance didn’t improve, there would be a **written warning** and **performance improvement plan**, which would last another four weeks. At the end of that, if your performance didn’t meet expectations, I’d have to let you go. If it did, then we’d move ahead with you in this role with the expectation that your performance remains consistent.![Offer a win-win path that could work for both of you. Preemptively address the preconditions of the offer and check with your lawyer or HR in advance about what this agreement should look like.
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**The second option** is this: if the role as I’ve described isn’t what you want, then we’d set up an arrangement that would give you time to conduct a job search and give me time to hire someone into the role.

In this option, we’d agree now that you’ll leave the role in three months. In the meantime, you’d continue ensuring our basic tech needs are met but we wouldn’t expect you to take on any new projects. We’d continue to pay you through your last day. (If you found a job sooner, then you could leave before that, but we’d stop paying you.) All of this would be contingent on your continuing to perform as you have been, which means being responsive, keeping our basic infrastructure running, etc. ![Be honest about any preference you have and why, while being clear that the decision is theirs to make. Include a clear deadline, but don’t force them to make a decision on the spot.
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**I prefer this option** because the formal performance improvement process is lengthy and I’m genuinely not sure that the evolved role is a great fit for your competencies and desires. But I want you to know that the decision is yours to make, and I will truly support you either way.

I know I’ve just shared a lot, but I wanted to put it all on the table. We can talk more about this now, or I can give you some time to think about it and then we can talk in the next day or two about which way you’d like to go.

I do feel urgency around figuring this out, so I’d like to meet no later than Thursday to hear your decision. **Do you want to talk now, or would you rather wait?**

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