

STRENGTHEN
LEADERS' ABILITY
TO GIVE FEEDBACK,
COACH
EMPLOYEES, AND
APPROPRIATELY
DOCUMENT
PERFORMANCE
CONCERNS

Performance Management & Coaching



Meet the Team



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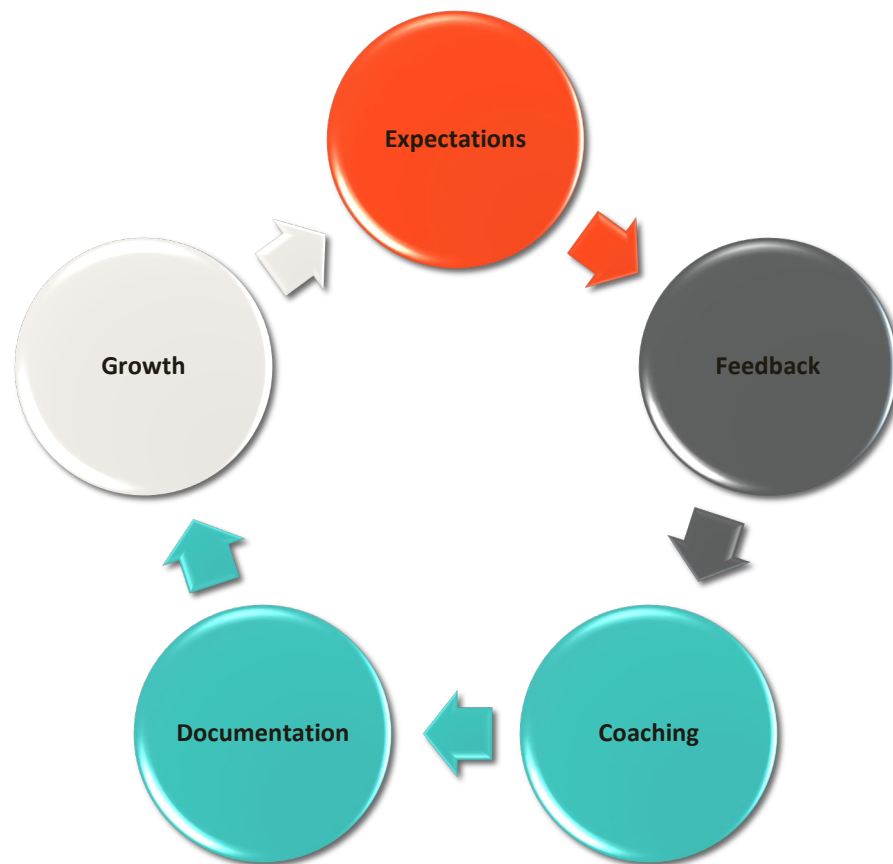


Agenda

- Performance Management Overview
- Setting Clear Expectations
- Giving Feedback
- Coaching Employees for Improvement
- Documenting Performance Concerns
 - Common Documentation Pitfalls
- Scenarios and Discussions



Performance Management Overview





Why Performance Management Matters

- Creates accountability and fairness across the hospital
- Improves team performance and collaboration
- Supports strong client and patient care experiences
- Helps team members understand expectations and areas for growth
- Protects the hospital through consistent documentation

What challenges have you experienced when addressing performance issues?



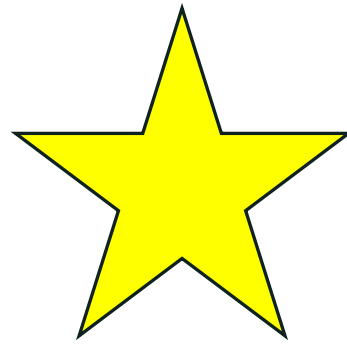
Manager Responsibilities

As a people manager, your role includes:

- Communicating clear expectations
- Providing regular feedback
- Coaching employees toward improvement
- Addressing concerns early
- Documenting performance when necessary



Setting Clear Expectations



SETTING CLEAR
EXPECTATIONS

Team Members
perform best when
expectations are clearly
defined



Setting Clear Expectations

Managers should communicate expectations related to:

- Job responsibilities
- Hospital procedures and protocols
- Communication and teamwork
- Professional behavior
- Client Service standards



Why Expectations Matter

Unclear expectations can lead to:

- Performance confusion
- Inconsistent results
- Frustration among team members
- Reduced accountability



Address Issues Early

Small concerns can quickly become larger problems if they are not addressed.

Why it matters

- Behaviors can quickly become habits
- Team members may assume the behavior is acceptable if it's not addressed
- Other team members feel standards are inconsistent
- Early conversations are easier than corrective action later



Giving Feedback



Giving Feedback

Effective feedback helps team members understand:

- What they are doing well
- What needs improvement
- How their behavior impacts the team



The SBI Feedback Model

Use the SBI model to structure feedback conversations

Situation

- Describe when and where the behavior occurred

Behavior

- Explain the specific behavior observed

Impact

- Share how the behavior affected the team, hospital operations, or client



The SBI Feedback Model

Use the SBI model to structure feedback conversations

Situation

- Yesterday during afternoon appointments

Behavior

- Two wellness plans were not applied during check-in

Impact

- This created billing confusion and required additional time to connect



Coaching Team Members for Improvement



Coaching Goals

- Encourage ownership
- Build confidence
- Strengthen skills
- Create a path for improvement



GROW Coaching Model





GROW Coaching Example





Training vs Coaching

Training	Coaching
Training is the way we teach people knowledge/hard or soft skills, to know how to do things	Coaching is the way we give them guidance on how to improve their performance
Training is a structured process where information and instruction are delivered from the trainer to the learner	Coaching is a collaborative conversation that helps team members identify solutions, improve performance, and take ownership of their decisions
Training just takes place at a particular point of time	Coaching is ongoing



Documenting Performance Concerns



Documentation Helps

- Maintain accountability
- Ensure consistency in leadership decisions
- Provide clarity on expectations
- Support HR/Legal review when needed

What Good Documentation Includes



Effective documentation should include:

- ✓ Specific behaviors observed
- ✓ Dates and examples
- ✓ Previous coaching conversations
- ✓ Clear expectations moving forward
- ✓ Impact on the team, hospital, or clients



Example

Details

Description of Infraction:

On March 2, March 6, and March 11, 2026, you arrived late to your scheduled 7:45 am. shift and were not present for morning rounds. On March 2 you arrived at 8:02 am., on March 6 at 8:07 am., and on March 11 at 8:10 am.
Morning rounds are used to review patient care plans, team assignments, and surgery preparation for the day. When you are not present, other technicians must review this information with you later, which disrupts workflow and delays patient preparation.
This concern was previously discussed during a coaching conversation on February 18, 2026, where expectations for arriving on time and participating in morning rounds were reviewed.

Plan for Improvement:

Moving forward, you are expected to arrive on time for all scheduled shifts and be present for morning rounds at 7:45 am. each day you are scheduled to work. To support improvement, you should plan to arrive early enough to be ready to begin work at your scheduled start time. If you anticipate being late due to an unforeseen circumstance, you must notify the Practice Manager or shift lead as soon as possible prior to the start of your shift. Your attendance will be monitored over the next 30 days to ensure consistent improvement. Consistent punctuality and participation in morning rounds are essential expectations for your role.

Consequences of Further Infractions:

Failure to demonstrate improvement in attendance and punctuality may result in further disciplinary action, up to and including additional written warnings or termination of employment.



Common Documentation Pitfalls

Avoid documenting:

- Opinions
- Emotional language
- Assumptions about intent
- Vague statements

~~PROBABLY~~

~~ATTITUDE~~

~~LAZY~~



Other common Mistakes

- Waiting too long to document concerns
- Addressing issues inconsistently across team members
- Skipping coaching before documenting
- Failing to follow up on improvement plans

Consistency and clarity are key.



Progressive Discipline Overview

- At WellHaven, we focus on documented performance or conduct concerns and follow a consistent progressive discipline process across hospitals.
- We do not rely on “at-will” as the reason for termination.

STEPS:

- Verbal Coaching
- First Written Warning
- Second/Final Written Warning
- Involuntary Termination



Scenario 1

Situation

A receptionist has received multiple client complaints about their tone during check-in. Clients have reported that the receptionist sounded impatient and dismissive.

Question

Which feedback approach is the most effective?

- A. Tell the receptionist they need to improve their attitude
- B. Use specific examples and explain the impact of the behavior
- C. Send an email reminding the entire team about customer service
- D. Wait to see if additional complaints occur



Scenario 2

Situation

A team member was assigned closing duties at the end of their shift, which included restocking treatment areas, completing cleaning tasks, and preparing the surgery suite for the next day. Over the past two weeks, the team member has left at the end of their shift without completing all assigned closing duties. Other team members have had to stay late to finish the remaining tasks.

This concern was previously discussed with the team member during coaching conversations on March 3 and March 10, where expectations for completing closing duties before leaving were reviewed.



Scenario 2 – continued...

Question

What is the most appropriate next step for the manager?

- A. Send a group message reminding the entire team about closing responsibilities
- B. Continue coaching the team member and hope the behavior improves
- C. Document the concern and clearly outline expectations moving forward
- D. Reassign closing duties to other team members



Key Takeaways

Effective performance management includes:

- Addressing concerns early
- Providing clear and specific feedback
- Coaching team members towards improvement
- Documenting concerns when issues continue

Questions



HR Contact

For questions related to:

- Performance concerns
- Coaching or documentation guidance
- Policy clarification
- Employee relations support
- Involuntary Termination

HR Contact

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Thank You!