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## MANAGER RESOURCE CENTER

### CUSTOM GUIDANCE

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Q.

Hello,

I lead sales for my company. I have a team member who is objectively not meeting his goals. The team member works hard and has some great strengths for our company. Unfortunately, I do not believe that he is in the right seat. I have asked him to consider either (a) what we need to do to be more successful in the current role or (b) consider other areas of the company that might be a better fit for their strengths.

It is a tough conversation, because I believe that the employee has a lot to offer and we have invested over a year together. I have reiterated that I want to be supportive and helpful. But, I can also tell that this is weighing on the employee.

Any advice?

A.

First, we want to applaud your thoughtful approach to navigating this difficult situation. Sales is a tough role to succeed in - one that naturally isn't for everyone. Your efforts to support this employee and continue to highlight his strengths despite falling short of specific sales targets is admirable.

It sounds like you are at a fork in the road, where you can either continue to coach this employee in the hopes he breaks through, or move forward with plans to secure a new role in the company where his strengths will be better applied.

We've gathered some thoughts from a few experts in the field and compiled them below to help you determine your next steps.

#### OPTION ONE: IMPROVE IN CURRENT ROLE

**Start with empathy.** It is human nature to feel poorly when falling short of performance standards, even if you know you're working hard to improve. This internalized experience can make an employee more anxious about conversations with their supervisor and wonder, "what will happen next?" As a manager, you can lower anxieties by giving authentic and direct feedback, and balance this with an understanding of the employee's experience. [Here are phrases](#) to help you validate what your employee is going through.

**Check-in often.** You've already expressed clearly to your employee that you support him and want to be helpful. To show this, offer to check-in with him regularly to see how things are going. Use this time to clarify expectations, offer feedback, and praise any improvements you see. More frequent check-ins (i.e. weekly) will allow you to define progress in "bite-sized" steps that are more easily attainable. Consider using [this action plan](#) together to help track how things are going. If some of these conversations are more challenging to facilitate, consider using [this template](#) to set the stage for a productive meeting.

**Provide the right resources.** It sounds like you've put a lot of effort into helping this employee get up to speed. For some individuals, since sales is so challenging, it might simply be a matter of more time. Beyond giving more time (which we realize you may not be able to do), consider asking this employee if he feels he has the right tools to be successful and feels equally confident using them.

If additional training could benefit the employee, you don't need to take that on yourself. Perhaps there is a mentor (within or outside of your organization) you can match this person with, or sign them up for professional development opportunities.



## OPTION TWO: TRANSITION TO NEW ROLE

**Stay consistent in your praise.** Make sure your employee knows the specific strengths you see in him so he feels like a valued contributor within the company. This is where your framing the situation as simply being in the “wrong seat” is highly effective and keeps his confidence up. In addition to labeling his strengths, talk about how important he is to the workplace culture and how his behaviors are aligned with company core values.

**Keep collaborating on next steps.** Individuals feel much better about things that happen *with* them rather than *to* them. Keep seeking feedback from this individual about where they see themselves being most successful. Ideally this will be a mutual decision, and your primary role can be educating your employee about options. Provide insights into what different departments do and consider looking at job descriptions together if possible.

**Create a smooth transition.** As the manager, consider what professional connections you can tap into. Talk to other team leads or department heads to set up informational interviews or informal meet-and-greets that help your employee network. Reach out to your colleagues in leadership positions to share what your employee's strengths are and why you see him as a valuable asset in their department. Regardless of where your employee lands within the company, you want to do all you can to ensure he starts out feeling seen, valued, and welcomed.

No matter which path you choose to pursue, you are already in the right space of ensuring this employee knows they have much to offer, and you want to see those skills put to good use. Your support and intentionality will go a long way, and no doubt will pay off regardless of the end result.