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Navigate the Road to Termination

By Diane Faulkner

Editor's note: This is bonus coverage of Fired! From the March issue of Credit Union Management.

When faced with under-performing employees, or those with bad attitudes, the quick answer might be "fire the sucker!" But that is not always the best answer. Look inside, at the credit union's policies and culture, before sending that problem employee out the door. You might be able to fix a bad situation.

MANAGEMENT'S ROLE

"The role of our supervisors is to develop people," says CUES member Sheila Wojcik, Ph.D., VP/ human resources for \$545 million/98,000-member, 250-employee [University Federal Credit Union](#) in Austin, Texas. "They are the key to their employees' success as well as the retention of good employees." With that mindset, University FCU revised its performance management system to include assessing past performance, focusing on each individual's future, and working with that employee to help meet personal goals.

"If there's a termination, it shouldn't be a surprise to anyone," says Wojcik, who says her CU's call center, a typically high-turnover area in any organization, slows the termination trek by facilitating rigorous monthly employee meetings focusing on metrically based information gathered on attendance, cross-sales, productivity and availability (not having the phone on "do not disturb" or "unavailable"). "It's the preparation built into the system that gives our supervisors the ability to provide factual historical evidence that can be used to address problems within individual counseling sessions. With facts at hand, supervisors can focus meetings on behaviors as compared to the written standard in the job descriptions," Wojcik says.

At its best, a system set up in this way would redefine the call center high performer, because more information than just total number of calls taken can be considered in assessing performance. During the monthly meetings, information can be shared regarding special circumstances that made some calls longer than average or necessitated longer after-call paperwork periods when call center representatives place their telephones on "unavailable."

For a supervisor, this kind of information helps explain to executives why members may complain about no one answering the phone after 10 or 15 rings during a specific time period, or explain why some phone lines show below-average numbers on calls-answered. As a result, a low number of calls that consisted of complex problems completed in a reasonable time frame with no member complaints would rate an employee above one who consistently takes a high number of calls, but passes a majority of calls off to others or gives wrong answers, generating complaints from internal and external customers.

To get managers to the point where they are comfortable counseling staff, it's the role of human resources to develop managers. Wojcik explains, "At University FCU, our senior human resources recruiter holds most of the annual workshops offered in the credit union's Leadership Management Program. We also have an executive or senior manager matched as a mentor to each Leadership Development participant, and they provide guidance with special situations and processes. In addition, HR management and senior staff help review disciplinary documentation before (counseling) meetings and can help prepare for a termination. In addition, an HR representative is always present at termination sessions."

When giving a "heads up," says Amy Aylward, VP/human resources for \$175 million/37,000-member, 98.5-employee [Sandia Area Federal Credit Union](#) in Albuquerque, N.M., a supervisor should stay away from using certain language that could open the

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door for inappropriate behaviors to reoccur. "A lot of time, supervisors will put a 90-day time frame for being good, improving behavior. It's better to reference past verbal conversations and use language like 'final warning' and 'termination.'"

IF THAT DOESN'T WORK...

If the credit union has:

- done everything it can to communicate behavioral expectations at the job and interpersonal level to staff, and
- has prepared managers in their roles as facilitators of personal and professional development, and
- human resources has seen to it that everyone has had the opportunity to obtain and utilize corresponding tools for growth, and
- an employee still not only under-performs, but also displays a bad attitude, then another dimension of counseling needs to occur.

SAYING GOODBYE

When it's certain an employee has to go, it's as important to prepare for the exit and inevitable questions from staff, as it is to prepare for the actual termination meeting itself.

Confidentiality is key, and so is sparing the departing staffer's dignity. University FCU alerts key security staff of the exiting employee just before the meeting. This way passwords can be changed before the employee leaves the building. Sandia Area FCU ensures all personal items are removed from the terminating employee's office so a quick exit can be taken to allow the now-former employee to avoid uncomfortable questions and stares from other staff.

And both Aylward and Wojcik stress that questions from remaining staff are handled by reminding everyone to respect that person's privacy. "There will always be break room conversations," says Wojcik, "but we must counsel managers to remind people that the rumor mill only detracts from our mission, which is to serve our members. We have to stick to the task at hand. The member first, foremost and fully in charge!"

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