



## Bullying & Difficult Discussions - The Investigator's Checklist

We strongly recommend that the situation be reviewed by another manager, a senior manager or, preferably, an independent investigator. The person investigating should make documented findings as to each of the following:

- ❑ **1 Have the targets, benchmarks or standards of behaviour been set ahead of time?** Are they in accordance with the business/team aims?)
- ❑ **2 Has the employee been denied any critical training or information** required to undertake their work successfully?
- ❑ **3 Are the targets, benchmarks or standards inappropriately skewed** across the team, such that the employee concerned is adversely impacted?
- ❑ **4 Is there consistent evidence of the manager's support** or coaching of the employee to meet the targets, benchmarks or standards?
- ❑ **5 Has the manager been managing the employee** in a manner inconsistent with the way the rest of the team has been managed? If so, was this done as part of the manager's support or coaching of the employee?
- ❑ **6 Is there clear and verifiable evidence** that the targets, benchmarks or standards haven't been met over a period of time?
- ❑ **7 Is the performance management process being conducted** within standard business protocols? Has the process been activated too hastily? Has the employee been given sufficient time to rectify their performance or behavioural failings?
- ❑ **8 Is there any need to depart from the standard performance management process** due to any known circumstances of the employee (for example: sickness, family tensions or even mental health issues)? If so, does the departure from the standard process assist or hinder the employee?
- ❑ **9 Has the employee been warned** about possible disciplinary action in the event of continued failings and, if so, is that disciplinary action in proportion to the failings?

