

## EXERCISE 12.3

### Handling an Employee's Termination\*

#### Overview

Chapter 12 discussed employee discipline and termination. Several issues are involved when an employee is performing below standards to the point that it is necessary to terminate the employment relationship. This exercise puts you in the role of HR professional and asks that you go through several steps leading up to the termination of an employee.

#### Learning Objectives

After completing this exercise, you should be able to

1. Experience the process by which HR professionals handle requests for termination by line managers and supervisors in the organization.
2. Make decisions on crucial issues involved in the termination process.
3. Develop an understanding of the sensitivity and gravity of the termination process.

#### Procedure

##### Part A: Individual Analysis

- Step 1. Read the scenario and the accompanying exhibits associated with the termination of a customer service representative. Then, follow these steps to ensure that the termination is carried out appropriately:
1. The first step is to investigate the situation to make sure the supervisor's claims are true. Who will you contact? What questions will you ask? What precautions should you take to assure that your investigation is confidential and legally appropriate?
  2. Ensure that the necessary documentation is in place based upon the discipline policy and your expertise as an HR manager.
  3. Assume that the termination is in fact warranted. Managers typically hold termination meetings at

\*Contributed by Jennifer Robin.

#### EXHIBIT 12.3.1

Return-path: <pwhite@ourcompany.com>  
Content-return: allowed  
Date: Wed, 11 Apr 15:45:01 -0400  
From: "Paul White" <pwhite@ourcompany.com>  
Subject: Termination  
To: you@ourcompany.com

HR Staff:

I have sent the necessary materials to your office to fire one of my customer service reps, Jeanette Landis. I've been pulling my hair out trying to get her to sell something for the past 6 months, but she can't do it! She repeatedly misses her sales goals by a huge margin due to her laziness and stupidity. I need to be rid of her as soon as possible so I can get an employee in here that can do the job. I could suspend her next, but I doubt it will help. Can you give me the go-ahead so I can show her the door? I know I was reluctant to fire my old high school buddy last year, but I will *gladly* hold this termination meeting.

Paul

*The Daily Register*, but it is not unheard of for the HR department to conduct this meeting. Given the available information, who should conduct the meeting? What steps will you take to prepare the manager and/or yourself for this meeting? Prepare an agenda for the termination meeting.

4. *The Daily Register* has some guidelines for severance packages, benefits, and outplacement services, but they are very informal and typically decided upon on a case-by-case basis. In this situation, what would you recommend for Jeanette?

- Step 2. Write a one-page memo in which you take a position on each question raised in step 1.

#### Part B: Group Analysis

Step 1. In groups, each member should review the memos of all other members. Each group should attempt to reach consensus on each question.

#### Scenario

You've been working with *The Daily Register*, a regional newspaper, for the last 12 months in the HR department. Your supervisor, the HR manager, is leaving for vacation tomorrow. With impeccable timing, one of the sales managers, Paul White, has submitted the paperwork for terminating one of his employees. The sales department is responsible for soliciting and securing advertisers for the newspaper. Paul maintains that Jeanette Landis has failed to reach sales goals for the last six months despite numerous attempts at discipline. Furthermore, Jeanette has threatened to file a lawsuit if *The Daily Register* terminates her employment. The HR manager delegates the handling of the termination to you. The documents sent by Paul, documents that you've received in HR, Jeanette's job description, and the company's discipline policy appear in the Exhibits 12.3.1 through 12.3.6.

**EXHIBIT 12.3.2**

---

*From Paul's file:*

Performance Appraisal

**Name:** Jeanette R. Landis

**Position:** Customer Service Representative

**Last Review:**            **Review Period:** 12.6    to 6.6

**Job knowledge:** Employee's ability to understand the required duties, responsibilities, skills, and procedures.

Rating: Exceeds Requirements

Comments: Jeanette has an excellent understanding of the requirements of her job. She has been instrumental in training new staff members this period.

**Quality of Work:** The degree to which the employee's work is accurate, complete, and conforms to *The Daily Register* and supervisor requirements.

Rating: Meets Requirements

Comments: The sales Jeanette makes are processed appropriately. She reports them to me in an acceptable fashion, and she maintains customer accounts adequately.

**Productivity:** Employee produces a large volume of work, is timely, and meets all deadlines.

Rating: Unsatisfactory

Comments: Jeanette does not make new sales. Rather, she maintains customer orders for the same ad, run on the same day, for the same cost. She does not make attempts to win new customers or grow current accounts. This area needs severe improvement. It is recommended that Jeanette repeat sales training.

**Organizational Skills:** Employee uses time effectively, sets priorities, and demonstrates initiative on projects.

Rating: Needs Improvement

Comments: Jeanette should be using time to increase her customer base. Despite discussions this quarter, no evidence of this is present. She is not a high initiative person.

**Communication Skills:** The employee's ability to convey ideas and information effectively and appropriately to others.

Rating: Exceeds Expectations

Comments: Jeanette is extremely articulate. Other Customer Service Representatives solicit her opinion on ad content on a regular basis.

**Overall Rating:** Needs Improvement

**Recommended Performance Raise:** N/A (Commission sales)

**Supervisor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**EXHIBIT 12.3.3**

---

*From Paul's file:*

Record of Disciplinary Action

**Name:** Jeanette Landis

**Position:** Customer Service Representative

**Date:** 10.2

**Reason for Action:** Jeanette has failed to meet sales goals for the second month in a row. We have discussed the reasons for her performance, and she has assured me that she will meet them next month. At this time, no further training is needed.

**Disciplinary Action Taken:** Documented verbal warning

**Supervisor Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Employee Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**HR Signature (if necessary):** \_\_\_\_\_ **Date:** \_\_\_\_\_

### EXHIBIT 12.3.4

---

*From your files (copies also provided from Paul):*

Record of Disciplinary Action

**Name:** Jeanette Landis

**Position:** Customer Service Representative

**Date:** 3.3

**Reason for Action:** Jeanette has again failed to reach sales goals. In December, it was recommended that she attend sales training. She has failed to schedule this training and has not made improvements in her sales as established last month. If she fails to schedule training within the next 30 days, she understands that further steps will be taken.

**Disciplinary Action Taken:** Written warning copied to HR.

**Supervisor Signature:** \_\_\_\_\_

**Employee Signature:** \_\_\_\_\_

**HR Signature (if necessary):** \_\_\_\_\_

### EXHIBIT 12.3.5

---

*The Daily Register*

Disciplinary Policy

*The Daily Register* attempts to provide the resources, training, and information required for individuals to perform their jobs successfully. If for any reason, performance is not up to the standards set by the employee handbook, job description, or direct supervisor, the employee shall be disciplined as follows.

If an employee has committed a minor infraction, the following steps will be taken:

1. A verbal warning will be given and will be documented, signed by the employee, and placed in the supervisor's file.
2. A written warning will be documented, signed by the employee and filed with the supervisor.
3. A written warning will be documented as in step two, but also copied to the HR manager. This warning becomes a permanent part of the employee's file.
4. A third offense is grounds for suspension.
5. Upon the fourth offense, the individual may be terminated.

Minor Infractions:

Excessive personal telephone calls and long distance calls without approval, misuse of office supplies or equipment, excessive and unapproved absences and/or tardiness, misuse of leave time, failure to reach performance standards.

A major infraction will be examined on an individual basis and may be grounds for immediate termination and/or legal action. Examples of infractions include the following:

Major Infractions:

Breach of confidentiality, falsifying records, embezzlement, violation of Drug Free Workplace or firearms policies, sexual harassment.

**EXHIBIT 12.3.6**

---

*The Daily Register*

Job Description

**Job Title:** Customer Service Representative

**Department:** Sales

**Purpose and Scope:**

The Customer Service Representative is responsible for selling advertising space in *The Daily Register*. He or she is crucial to the profitability of the organization, securing revenue from one of three stakeholders (i.e., advertisers, subscribers, and other readers).

**Responsibilities:**

The Customer Service Representative is responsible for selling advertising space in the newspaper to both established accounts and new customers. Once advertising orders are placed, he or she is responsible for communicating to the creative services department as to the size, content, and design of the ad. Finally, the Customer Service Representative handles questions and concerns about the presentation of the advertisement.

**Organization Relationships:**

The Customer Service Representative reports to the Sales Manager.

**Job Requirements:**

The Customer Service Representative is required to have training in the following areas:

- 4-year degree
- Minimum of 2 years of work experience, preferably in sales
- Knowledge and understanding of sales
- Knowledge of sales techniques such as cold calls, market research, and presentation.

Fulfillment of experience and training requirements upon hire is at the discretion of the Sales Manager.

**Approval:**

Dept. Manager/Supervisor: Paul White

Date: 2/3

Human Resources Department: Shirley Tyler

Date: 15 Feb