

Lessonly

Performance Improvement Plan Template



Overview

It is true, "improvement starts with I," however, sometimes it is critical for an employee's supervisor to make an employee aware of unsatisfactory behavior so that the employee and company both can move forward in a positive trajectory.

Use this performance improvement plan template and tips to help guide your process when working with employees that need some help getting back on track.

Let's get started.

01

PIP Template

02

Tips

- Improvement Process
- Failure to Improve
- Unacceptable Performance Observed
- Improvement Objectives

To: _____ From: _____

Subject: Performance Improvement Plan _____ Date: _____

Introduction

Write a brief description and general overview of why the employee is being given a performance improvement plan.

Unacceptable Performance Observed

1. Most important performance issue

2. Second most important performance issue

3. Third most important performance issue

Improvement Objectives

1. Improvement objective(s) for #1 above

2. Improvement objective(s) for #2 above

3. Improvement objective(s) for #3 above

Employee Name: _____

Employee Signature: _____ Date: _____

Supervisor Name: _____

Supervisor Signature: _____ Date: _____

Tips

Improvement Process

Timeframe – Setting a timeframe, as mentioned above, is an important part of any performance improvement objective. If the employee doesn't know how long they have, they may have one of two reactions: panicking, assuming they must fix all their issues immediately; or not responding, assuming they have a long time to rectify their behavior. Setting a concrete end date, at which point their performance will either be deemed improved or still unsatisfactory, helps establish what they're working toward.

Be sure to detail what happens at the conclusion of the set time period. Will the employee be let go if they haven't met their objective, or will the process escalate in some other way? If they do improve, are they completely off probation, or will they be assigned another objective to work toward?

Ongoing Check-Ins – Checking in frequently not only helps you see whether the employee

is progressing satisfactorily, it provides the employee with the motivation and back-pats that they need to keep making progress. Improvement is not easy, and failing to acknowledge the employee when they do well (or to remind them of their goals when they aren't living up) is a sure way to reduce their incentive.

Create a check-in plan at the same time you create the performance improvement objective, and stick to it. Perhaps it is a weekly review for attendance issues, or a brief follow-up after every meeting if the problem has to do with working as a team. Let the employee know when you'll be checking in with them, so they can look forward to touching base.

Who Is Involved – Decide at the outset who is involved: just you, you and another manager at a different level (higher or lower), someone from another department, or even have other team members on board to help the employee meet their goal.

Failure to Improve

No one wants failure, but it is an inevitability that not everyone will succeed, no matter how carefully you set up your improvement plan. In this case, two things could happen: reassignment (moving seats on the bus) or removal (getting kicked off the bus). Accept these possibilities from the outset, and be willing to follow through with the steps you've set up in your improvement process.

Communication of these consequences can be difficult, so the following paragraphs provide examples.

Reassigned – Hi Sally. We're sorry to tell you that you haven't been able to meet your performance improvement goals over the last three months. Because of that, we're going to have to reassign you to another position. Instead of [Sally's current job], you will now be doing [Sally's new job]. We're hoping this new role will remove some of the pressures making it difficult for you to meet your goals, and that your performance will improve so we can continue working with you. [Provide any more details required to complete the transition.]

Removed – Hi Sally. Unfortunately, you haven't been able to meet your performance improvement objectives, so we have no choice but to let you go. We have provided a collaborative plan to improve and wish the plan would have been completed, but as this is not the case, it is time you part ways with our company. [Provide any more details required to complete the termination.]

Unacceptable Performance Observed

Unacceptable performance can come in many forms. While you may not have covered every eventuality in your employee handbook, it's a little like Justice Potter's definition of obscenity: you know it when you see it. When you're experiencing less-than-awesome performance from one of your employees, it can take a toll on your workflow, on company morale, on your ability to deliver to clients and customers, and even on safety.

When an employee creates problems you have to deal with, it can be hard to be sympathetic or want to work with them further, but keep in mind how much time and effort you've already put into their hiring and training. If at all possible, work through these issues by first calling the behavior to their attention and explaining why you need them to improve their performance.

Sample issues with explanations for why they are important might include:

- **Arriving Late or Calling In Too Frequently:** When an employee routinely doesn't show or rolls in after her official start time, it can compromise routine and make the whole workplace sloppy. Start times keep workflow smooth and ensure a full staff at all times
- **Failing to Meet Performance Goals or Objectives:** Performance goals and objectives are set so that each employee knows how best to contribute to the overall success of the company, and failing to meet them hurts everyone.

- **Compromising Safety Standards:** Safety standards are set by federal, state and company regulations and must be followed exactly to ensure employee safety.
- **Having Repeated Negative or Contentious Interactions with Customers or Clients:** Customers or clients are the bread and butter of most organizations, and keeping them happy ensures the ongoing success of the company.
- **Not Working Well in Team Environments:** Employees must do their part to contribute without taking over or shutting coworkers down, so those that do not participate fairly need to learn to improve their performance.

Improvement Objectives

Improvement objectives respond directly to the issues the employee is having. After all, if you cannot create an objective that, when followed, will directly improve the problem, there isn't much point.

In addition, creating improvement objectives achieves several other goals, such as:

- Very clearly explaining what the employee needs to do better
- Giving the employee a goal to work toward, providing motivation
- Demonstrating that you believe in the employee's ability to improve
- Officially documenting your efforts to improve the employee's performance, in case you ever need to let them go

Sample performance improvement objectives for each of the issues listed above would look something like this:

- **Arrive on time** to work as well as returning promptly from breaks and lunch, and come in every day unless using official sick leave or vacation time.
- **Meet performance goals** or objectives as stated in other documents.
- **Follow all safety regulations** to the letter, and document any issues as dictated by company policy.
- **Improve customer satisfaction** ratings by 20 percent.
- **Contribute** at least three suggestions to each company brainstorming session.

Note the use of figures to give concrete goals, and time period over which the improvement must be achieved, i.e. 90 days or 6 months.

Better work starts here

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GET A PREVIEW

The central graphic is a white rectangular area containing a grid of lesson cards. Each card has a colored header bar (yellow, teal, or red) and a small yellow progress indicator. Three callout boxes are overlaid on the grid, each featuring a photo of a person and a lesson title. A black dashed line with an arrow points from the 'GET A PREVIEW' button to the top-left callout box. A solid black arrow points from the bottom callout box to the top-right callout box. A hand-drawn black circle highlights the '3 items' text in the top-right callout box.

Agile Customer Service

Keeping 1,000 support reps on the same page isn't easy, but with thoughtful training, it's simple.

3 items

Selling is Personal

This lesson highlights our five favorite sales numbers from the past year.

3 items

Doing Better Work

Better work in action looks like staying nimble, toward alignment, and constantly innovating.

3 items