

## Initial Meeting

### Date & Attendees

<b>Initial Meeting Date:</b>	DD/MM/YYYY
<b>Employee Name:</b>	
<b>Employee Title:</b>	
<b>Employee's Manager:</b>	
<b>Department:</b>	
<b>Reviewer:</b>	Insert name of individual leading meeting and presenting plan to the employee
<b>Present:</b>	<ul style="list-style-type: none"> <li>◆ Insert names of individuals present at meeting</li> <li>◆ Insert names of individuals present at meeting</li> <li>◆ Insert names of individuals present in meeting</li> </ul>

### Previous Conversations and/or Verbal Warning

On Insert date, Insert names of individuals present met with you to discuss:

- ◆ Insert details about what was discussed. Be specific.
- ◆ Insert details about what was discussed. Be specific.

Subsequently, on Insert date, Insert names of individuals present met with you again to discuss:

- ◆ Insert details about what was discussed. Be specific.
- ◆ Insert details about what was discussed. Be specific.

### Performance Improvement Area(s)

Despite previous conversations and warnings, your performance with respect to the following behavior(s) or job success factors has not met expectations.

Behavior or Job Success Factor	Example
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- 22 HR topics
- Create HR intranet

#### Support your HR Function

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- Legislation Portal
- Remote Workforce Portal
- Mental Health Portal
- Diversity & Inclusion Portal
- Weekly updates, email notifications
- Help & support. With real humans!



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HR Toolkit for Small Business, but made for HR consultants with the following differences:

- Special licensing for use with clients
- Additional module + additional download of pre-assembled folders and templates to create your own master HR toolkit to re-use for new clients
- Pricing.

- ◆ List internal and/or external support & resources

## Action Plan

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Your action plan for working toward achieving these results is listed below as a series of incremental goals. Each follow up meeting between now and the conclusion of this performance improvement plan will review the status and achievement of these goals. Changes, updates and/or additions will be made at each follow up meeting.

Measurable Goal	Completion Date
◆ List measurable, observable, incremental goal	◆ Insert date
◆ List measurable, observable, incremental goal	◆ Insert date
◆ List measurable, observable, incremental goal	◆ Insert date

## Consequences

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If the results specified in the **Expected Results** section, above, are not met within the **Time Frame** indicated above, you will be subject to disciplinary action, up to and including termination of employment for cause.

## Authorization & Acknowledgement

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For both copies of this form, initial each page and sign as indicated below.

Return one copy of this form to  by Insert date - usually 2 working days after the date of the initial meeting, at the latest, and retain one copy for your records.

### MANAGER

Enter Legal Name of Company per:	
<input type="text"/>	
Signature	Date
<input type="text"/>	<input type="text"/>
Name of Authorized Signatory - typically the employee's manager	Title of Authorized Signatory
<input type="text"/>	<input type="text"/>

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## Follow-Up Meeting #1

### Date & Attendees

<b>Meeting Date:</b>	DD/MM/YYYY
<b>Present:</b>	<ul style="list-style-type: none"> <li>◆ Insert names of individuals present in meeting</li> <li>◆ Insert names of individuals present in meeting</li> <li>◆ Insert names of individuals present in meeting</li> </ul>

### Performance Improvement Area(s) – Observations & Outcome

Performance Improvement Areas	Observations/Outcome
Copy Performance Improvement Area from initial meeting	Insert observations made during the review period regarding this improvement area
Copy Performance Improvement Area from initial meeting	Insert observations made during the review period regarding this improvement area

### Action Plan – Progress Update

Measureable Goal	Completion Date	Status
◆ List goal from initial meeting	◆ Insert date	◆
◆ List goal from initial meeting	◆ Insert date	◆
◆ List goal from initial meeting	◆ Insert date	◆

### Summary Comments

Insert summary comments regarding the review period

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## Follow-Up Meeting #2

### Date & Attendees

<b>Meeting Date:</b>	DD/MM/YYYY
<b>Present:</b>	<ul style="list-style-type: none"> <li>◆ Insert names of individuals present in meeting</li> <li>◆ Insert names of individuals present in meeting</li> <li>◆ Insert names of individuals present in meeting</li> </ul>

### Performance Improvement Area(s) – Observations & Outcome

Performance Improvement Areas	Observations/Outcome
Copy Performance Improvement Area from initial meeting	Insert observations made during the review period regarding this improvement area
Copy Performance Improvement Area from initial meeting	Insert observations made during the review period regarding this improvement area

### Action Plan – Progress Update

Measureable Goal	Completion Date	Status
◆ List goal from initial meeting	◆ Insert date	◆
◆ List goal from initial meeting	◆ Insert date	◆
◆ List goal from initial meeting	◆ Insert date	◆

### Summary Comments

Insert summary comments regarding the review period

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