



DRIVING PERFORMANCE

Manager's Guide

Performance Improvement Toolkit

#DrivingDreams



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Manager's Guide

Performance Improvement Toolkit

This toolkit offers you guidance and support at every stage when it comes to managing performance and helping to turn someone's performance around.



**To be the car buyers' champion
by offering unrivalled choice,
value and service**

In order to achieve our vision we need to ensure we are focused on our three main stakeholders in the Virtuous Circle. The Virtuous Circle helps us all to deliver further value to our shareholders by consistently providing what our customers want through releasing the potential of our teams. Delivering strong sales, margins and profit growth will mean that we can continue to reinvest in our team members and sites.



As a leader in the business you have a responsibility to monitor our team members' performance and identify any areas of opportunity for improvement. This toolkit will help you do so and should be seen as a positive intervention to help improve someone's performance and engagement. Our Core Values should be at the heart of all your interactions with the teams.



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Quick links:



Managing Under Performance

Why is it so important?

What if a team member isn't performing?

This will impact productivity and of course the team. If you have an underperforming team member, you as their line manager will notice that:

- 🏎️ workload increases for others
- 🏎️ team morale is affected
- 🏎️ targets are not met

Even a usually high performer can become complacent or hit a period where they are struggling. They can become 'bored' or impacted by an external factor and as a result, their performance levels drop. What we need to remember and understand is that they have knowledge and expertise which can be shared and we should look to find out why they have lost motivation and re-engage them. They may need new challenges, so think if there is any stretch and variety you can offer that will benefit both them and your wider team.

Improving Motivation

Sometimes poor performance has its roots in low motivation. Each of us is motivated by specific needs. Our most basic needs are inborn, having evolved over tens of thousands of years. Your job is to work closely with the team member to identify which of these needs are not being met, addressing this gap by meeting the needs and creating a motivational environment in which to work.

There are key interventions that may improve people's motivation:

- 🏎️ identify the 'need' of the individual through honest open discussion
- 🏎️ set performance goals
- 🏎️ provide performance assistance
- 🏎️ provide performance feedback



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Managing Under Performance

Why is it so important? *continued*

Lack of ability may be associated with the following:

- ⚙ over-difficult tasks
- ⚙ low individual aptitude, skill and knowledge
- ⚙ evidence of strong effort, despite poor performance
- ⚙ lack of improvement over time

People with low ability may have been poorly matched with jobs in the first place. They may have been promoted to a position that's too demanding for them. Or maybe they no longer have the support that previously helped them to perform well.

When addressing the issue of under performance always ensure:

- ⚙ you have specific and documented evidence to support your assessment
- ⚙ you have carried out regular reviews and the team member clearly knows what is expected of them
- ⚙ the underpinning factor for driving performance is to have, open, honest and regular feedback
- ⚙ if you are not comfortable with any of the activity required as a line manager, you should ask for support from your manager



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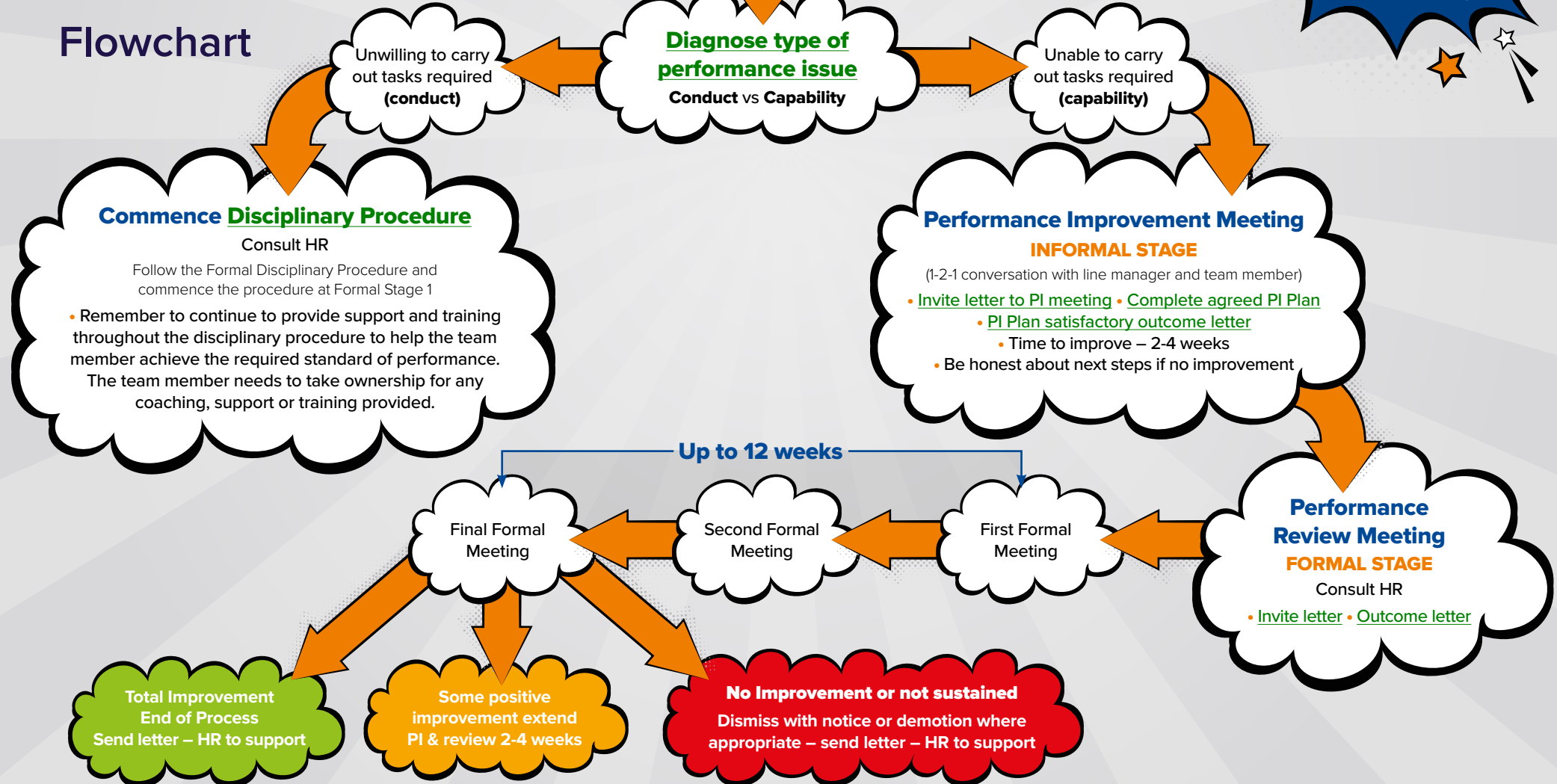
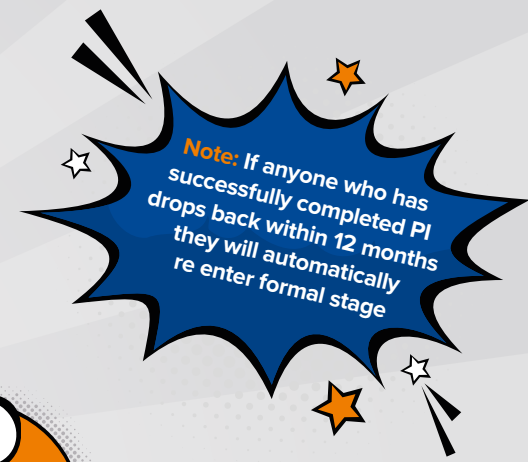
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Performance Improvement Process Flowchart



Performance Improvement Process

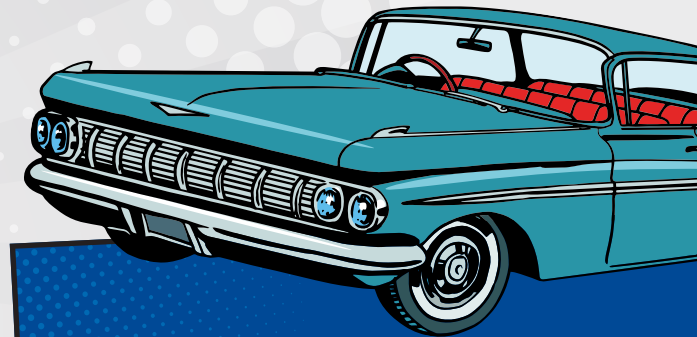
Supporting notes

RECORD OF CONVERSATION

This should be carried out as a 1-2-1 conversation between the line manager and the team member.

The areas to be covered include the following:

- 🌀 identifying any underlying reasons for poor performance. Has the job changed or become more difficult? Has the team member changed e.g. their health or personal circumstances?
- 🌀 specify the shortcomings and the standards of performance required in an open and honest way.
- 🌀 what solutions can be put forward to resolve the issues/problems.
- 🌀 agree what support should be offered – training, coaching, buddying etc. Make clear to the team member that once arrangements have been made it is for the team member to ensure they participate in the support offered.
- 🌀 a 'reasonable' time should be given to improve and maintain.
- 🌀 does the team member acknowledge and understand the effect of their actions and the impact this may have on others in the team/department/business performance.
- 🌀 ensure that the team member clearly understands that if their performance does not improve that they will be issued with Performance Targets to achieve in line with the Performance Improvement process.
- 🌀 written notes of the conversation and agreed actions must be made and should be recorded as evidence of the conversation – email is fine.



In all instances the agreed objectives must be:

1. appropriate to the team members job role
2. linked to Core Value behaviours that influence the performance measures
3. have appropriate targets and timescales attached
4. make sure any actions agreed relating to additional support, training or coaching are fulfilled



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Performance Improvement Process

Supporting notes *continued*

DIAGNOSING POOR PERFORMANCE

This needs to be conducted if there has been either no improvement made or insufficient progress has been achieved despite support being given to the team member. This allows the line manager the opportunity to spend time collecting data, facts, etc. and reviewing the evidence from previous conversations.

Evaluate the facts

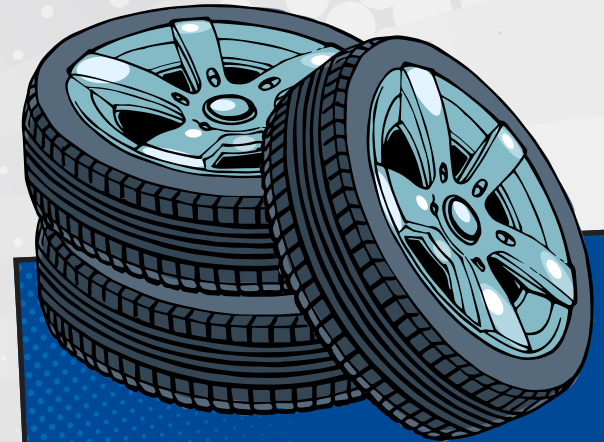
- 🔧 **Establish that the individual's performance is below that required of the role. What are the performance measures in place to measure this? For example sales targets, NPS targets, failure to achieve financial targets or levels of accuracy and compliance etc.**
- 🔧 **Are you demanding realistic standards? Are there any external factors outside the team member's control which maybe affecting his/her performance?**

Preparation and consistency are key when you wish to address good and poor performance issues. When dealing with under-performance you must be clear about what type of problem it is:

- 🔧 **Conduct** – they can perform to the required standard but do not – a “**will**” issue
- 🔧 **Capability** – they cannot perform to the required standard – a “**skill**” issue

A performance problem will not necessarily be caused only by the individual concerned – wider job and organisational issues may be involved and this needs to be taken into account.

Before you can work to improve poor performance, you have to understand its cause, this may well be an area where intensive support/coaching is required or new stretching challenges set that will see a real uplift in performance. You can seek support from HR at any point during the process to discuss the diagnoses and subsequent process to therefore implement.



Put simply...

Is the team member performing poorly because s/he is unable to carry out the tasks required, or is the team member performing poorly because s/he is unwilling to carry out those tasks?



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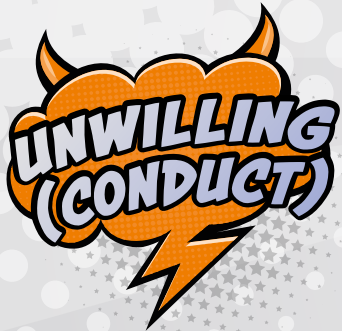
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Performance Improvement Process

Supporting notes *continued*

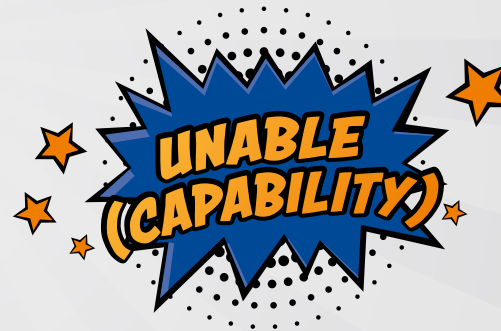
DIAGNOSING POOR PERFORMANCE *CONTINUED*



Incorrect diagnosis can lead to lots of problems later on.
The first stage is to diagnose why they are unwilling.

- 🏆 **Assess the level of support and training needed/given – is/was it fit for purpose**
- 🏆 **Have a coaching conversation to understand what may be holding them back from performing**
- 🏆 **Know your team members and observe their behaviours alongside their performance**

If you believe an team member is not making enough of an effort and is therefore unwilling to carry out the tasks required, you will need to follow the **Disciplinary Procedure**.



But, if the real issue is the team member's ability, then managers must ensure that they have taken reasonable steps to coach, support and train the team member to enable them to carry out their duties to the required standard.

You need to ask yourself as a line manager, “have you made the team member aware of your concerns previously?” And if not, why not? A key element of a line manager's role is to take accountability for reviewing and providing both feedback and coaching to your team on a regular and ongoing basis. Honest and Supportive are two of our Core Values and so you must ensure all conversations relating to their performance are open, honest, documented and from a supportive view point.



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Performance Improvement Process

Supporting notes *continued*

CONDUCT A PERFORMANCE IMPROVEMENT MEETING – INFORMAL STAGE

Process

Give your team member time to prepare, be open and honest – share the Performance Improvement Plan (PIP) in advance and explain that you will be discussing their performance and highlight the areas you're concerned about.

As this is an informal stage of the procedure, it is acceptable for the line manager to be present without a note taker and the team member does not have the right to representation. The team member should be encouraged to participate as much as possible.

Open with a positive statement, smile, be warm and friendly – the team member may well be nervous; it's your responsibility to create a calm and non-threatening atmosphere. Set the scene – simply explain what will happen – encourage a discussion and as much input as possible from the team member.

By applying your coaching conversation skills you will facilitate a discussion (80% them 20% you) the aim of which is to encourage them to take responsibility for their performance.

Through open and probing questions you will encourage them to identify specific areas of underperformance, reasons for dip in performance, the options they have for action, specific actions they will take and how this will lead to improved performance. You will then agree specific targets and respective review dates.

- 🏆 **Spend time and explore their reality of the situation – what's really going on?**
- 🏆 **Get to the heart of the matter and encourage them to identify options for actions**
- 🏆 **The targets need to be broken down so that they are manageable and achievable**

Each shortfall should be listed separately -

this will help you to determine a SMART objective for each shortfall. Be as specific as possible, this will make the measurement of improvement or continued under performance easier to identify. Improvement needs to be specifically measured on the result or outcome of the task, not necessarily how the targets were achieved.

At this meeting, the team member must complete a mutually agreed **Performance Improvement Plan (PIP)** and then email back to the line manager straight after the meeting so that you both have a copy whilst it's fresh in your minds. This is a must do action and you should ensure you follow up if you have not received it within 24 hours.



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Performance Improvement Process

Supporting notes *continued*

CONDUCT A PERFORMANCE IMPROVEMENT MEETING – INFORMAL STAGE *CONTINUED*

Guidelines

It is vital that the line manager explains the process to the team member. Discuss the performance shortfalls and ensure that they understand what is required to have achieved the required standards, targets or objectives.


Identify relevant individuals within the team/department who can support, train or coach the team member to achieve the agreed target/objective.

The life span of PIP may vary depending on the circumstances and will be determined by the line manager – review period is usually two to four weeks.

Provide feedback – it is very important that the line manager lets the team member know how they are doing. The line manager must provide the team member with every opportunity to succeed. After all the whole intention of performance improvement is to create a competent, well adjusted individual/team!

The benefit of giving constructive feedback is that it:

- 🏆 rewards and encourages the right behaviour or performance
- 🏆 clarifies expectations and the required standards
- 🏆 helps individuals to improve poor performance
- 🏆 creates the opportunity to analyse and remove any barriers to performance



Remember:
you must honour
the review dates and
ensure any support
agreed is provided



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Performance Improvement Process

Supporting notes *continued*

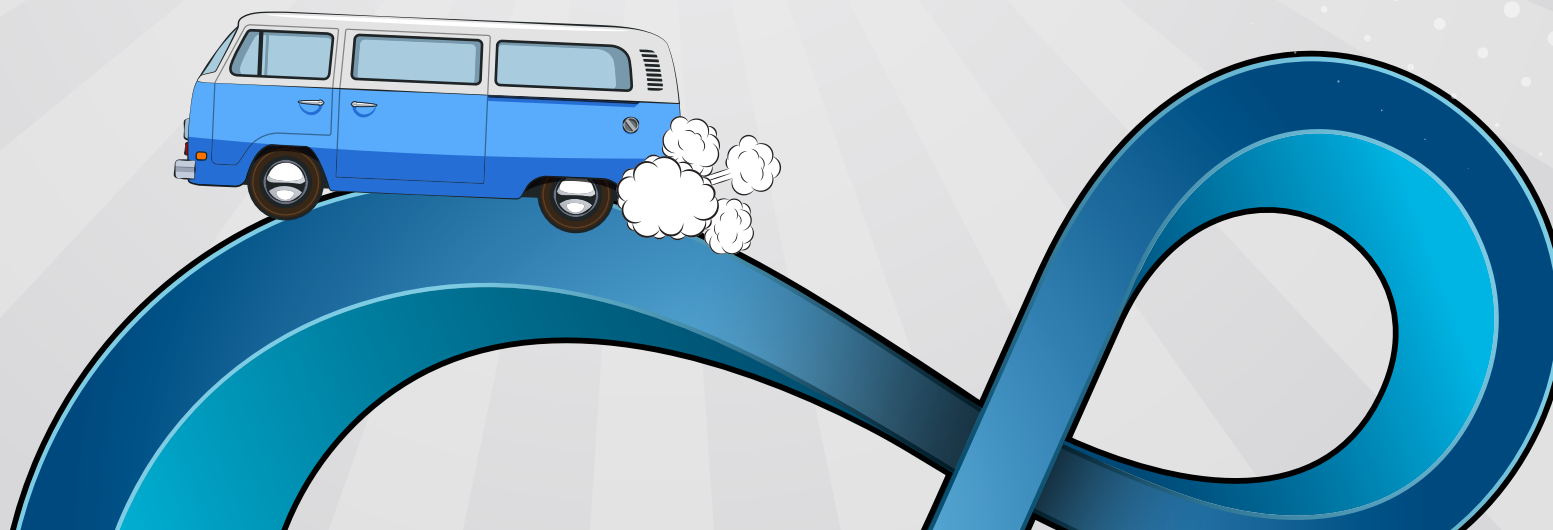
PERFORMANCE REVIEW MEETING – FORMAL STAGE

Consult HR. By this stage, you will have accrued plenty of evidence, reviewed the PIP SMART objectives/support and given the maximum time required to see the expected improvements. If there has been insufficient improvement at the informal stage, consult with HR and move to formal performance improvement stage. If some progress has been made, consider repeating the informal stage and revisit the improvement plan.

Ensure you follow the guidelines in our Performance Improvement Policy

COMMENCE DISCIPLINARY PROCEDURE – FORMAL STAGE

Consult HR. Where you think the team member is simply not conforming to a reasonable management request and is just not willing to achieve targets they will be subject to the [Disciplinary Policy](#).



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Performance Improvement Process

Timeline



Initiate informal PIP stage

Allow a minimum of **two weeks** and a maximum of **four weeks** at the informal PIP stage to see the required improvements.

If you have allowed two weeks at the informal PIP stage:



1. First formal performance review proceedings will commence



2. Second formal performance review proceedings will commence



3. Final formal performance review proceedings will commence

If you have allowed four weeks at the informal PIP stage:



1. First formal performance review proceedings will commence



2. Second formal performance review proceedings will commence



3. Final formal performance review proceedings will commence

Under usual circumstances you would allow four weeks to see a sufficient improvement at each formal performance review stage. We may reduce this to a shortened review period depending on the severity and impact of underperformance.



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Performance Improvement Meeting (Informal Stage)

Example of a Performance Improvement Plan

You should use the suggested template as a guideline of how to structure an effective Performance Improvement Plan (PIP).

Date started:			Date to be completed:			
OBJECTIVE/ TARGET	ACTIONS TO COMPLETE FOR EACH OBJECTIVE/ TARGET	MEASURE/ EVIDENCE OF COMPLETION	SUPPORT (coaching, training, specialist help etc.)	REVIEW DATE	DATE TO COMPLETE	MANAGER'S COMMENTS ON PROGRESS
Example Achieve NPS 80%	Example Complete all post collection calls	Example Send a list of all post collection calls/outcome to the sales controller	Example 1-2-1 with sales controller to structure post collection call	Example Weekly/ bi-weekly review date/s	Example Month end	
Example Achieve minimum green banding for finance £####	Example Revisit finance on each pre collection call	Example Log each pre collection call/objecton	Example Sales controller to monitor and feedback pre collection presentation	Example Weekly/ bi-weekly review date/s	Example Month end	
Example To decrease the instances of conflict with your colleagues created through your communication style	Example Use a respectful and positive tone and language when sharing information with or giving feedback to your colleagues	Example Fewer complaints from team members; observation and feedback from myself	Example Take part in PD workshops for Confident Communication and Handling Difficult Situations. Post course coaching with myself to use the tools. 1-1 weekly to share with me your thoughts and feelings that might drive negative behaviours	Example Weekly/ bi-weekly review date/s	Example Give two to four weeks completion date	

When you are recording objectives ensure they are **SMART** and that it is clear what additional support, if any the team member might need in order to achieve them. Remember this might not simply be training and coaching it could rely on another persons action so be clear to capture it and ensure accountability is clear on who will engage any third parties to support if required.



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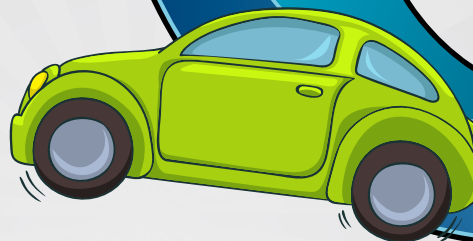
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Performance Improvement Meeting (Informal Stage)

Putting SMART objectives together

-  Specific
-  Measurable
-  Achievable
-  Relevant
-  Time based



What do we mean by



Specific means that the objective describes an observable action, behaviour or outcome. For example 'answer the telephone quickly' is not specific. However 'answer the telephone within three rings' is very specific.

What do we mean by



Measurable means that you are able to measure the extent to which an objective has been achieved. If you link this to a rate, number, percentage or frequency it is easier to measure.

What do we mean by



Achievable means with a reasonable amount of effort and application it can be achieved. Make sure you think hard about what constitutes a realistic amount of effort. It needs to be a stretch but not impossible.

What do we mean by



Relevant means it is something you can actually have an impact upon. That is links clearly with your longer term aspirations and goals. It also means being relevant to the team or company you are working within.

What do we mean by



Time based means that there is a time frame within which the objective is undertaken.



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Performance Review Policy (Formal Stage)

Overview

We're an ambitious team and are always striving to achieve great things – we'll never pop ourselves into cruise control. We understand that there may be times when you might need support to achieve the levels of performance required. Where that is the case we'll use this process to help you get back 'on-track'.

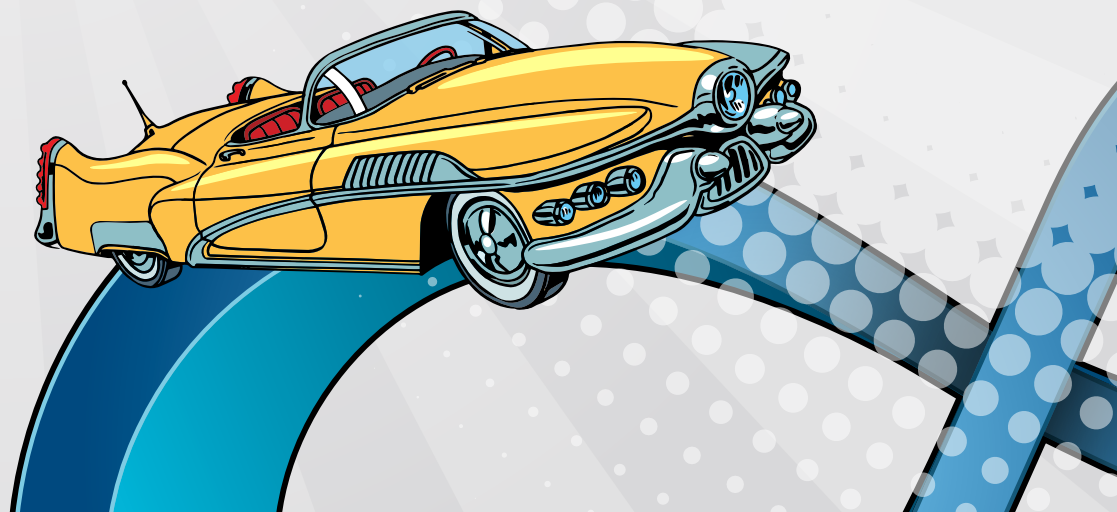
We see performance discussions as an opportunity to progress positively and we'd love you to embrace them as a chance to improve. A bit like when car manufacturers release the latest model of your favourite car – with all the latest upgrades!

Sometimes, we might feel that a performance issue is so significant we can't talk to you about it informally and need to start performance improvement meetings.

Where we need to meet with you to discuss your performance formally we'll write to you inviting you to a formal performance review meeting. You should read this policy alongside the section titled 'things you'll want to know about formal meetings' which includes information about appeals and your right to a companion. If we've not previously discussed your performance at a **formal performance review meeting** then the outcome of that meeting is unlikely to be anything more than a **first performance warning** which will last twelve months.

If we've already discussed your performance at a **formal performance review meeting** and we've not seen the required improvement within the required timescale then we'll ask you to attend a second **formal performance review meeting**. The outcome of that meeting is unlikely to be anything more than a **final performance warning**, which will last twelve months.

If we've discussed your performance at a second **formal performance review meeting** and we've not seen the required improvement within the required timescale then we'll ask you to attend a final **formal performance review meeting**. The outcome of that meeting could be that your employment is brought to an end or you may face demotion if there is a suitable position available within the business.



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Disciplinary Policy

(Formal Stage)

Disciplinary: avoiding the warning lights on your dashboard

We hope not to use this policy and that you're clear on what's expected from you in order to maintain a well-oiled machine up to this point. This policy should be read alongside our policy about 'things you'll want to know about formal meetings' which includes information about appeals and your right to a companion.

In most cases we'll try and resolve minor issues of misconduct through informal discussions. If the informal discussions don't lead to the changes or improvements we're hoping for or we think things are too serious for an informal discussion then we'll follow our formal procedure. We might not follow any procedure if you're subject to a probationary period.

Investigations

We'd like any investigation to be as helpful as possible to our understanding of a situation. That means you might be asked to let us know the names of any relevant witnesses, give us any appropriate documents and meet us to help with our investigation.

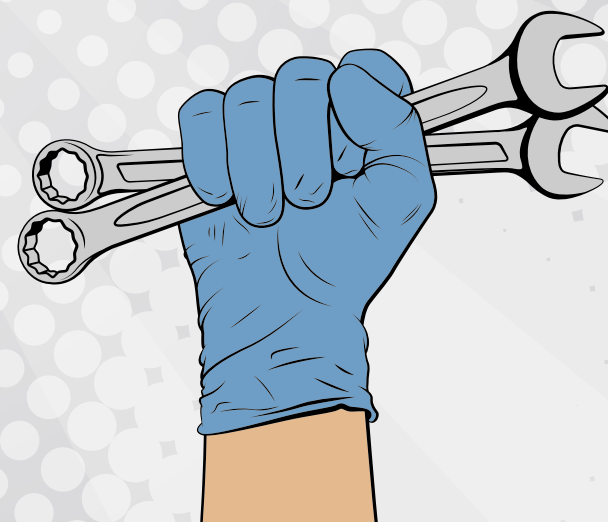
It's important that we have an open and honest conversation if we need to investigate something with you. That means you won't be able to bring a companion to an investigation meeting and we might not give you notice of the investigation.

Procedure at a formal disciplinary meeting

If we need you to attend a formal disciplinary meeting then we'll write to you inviting you to a meeting, giving you information about the allegations and the possible outcomes of the meeting. That letter could also include a summary of relevant information, a copy of the documents that you'll need to prepare for the meeting and witness statements.

Suspension

We may suspend you on full pay where you are subject to an investigation or disciplinary proceedings. To protect us and you during any period of suspension we may remove your access to our systems, including email. We may also ask you to return any company property to us but you agree we won't need to compensate you if we do.



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Disciplinary Policy

(Formal Stage) *continued*

Disciplinary outcomes

We want to be upfront about what an outcome of a disciplinary meeting might look like. We've set out some of the disciplinary outcomes below which might be issued after a formal disciplinary meeting (but, it's not an exhaustive list).

Stage 1 – First Written Warning. Usually lasting six months (but possible to last for 12 months) and appropriate where the allegations relate to a first act of misconduct where there are no other active written warnings on your disciplinary record.

Stage 2 – Final Written Warning. Lasting up to twelve months and appropriate for:







- a) misconduct where there is already an active written warning on your record; or
- b) misconduct that we consider sufficiently serious to warrant a final written warning even though there are no other active warnings on your record.

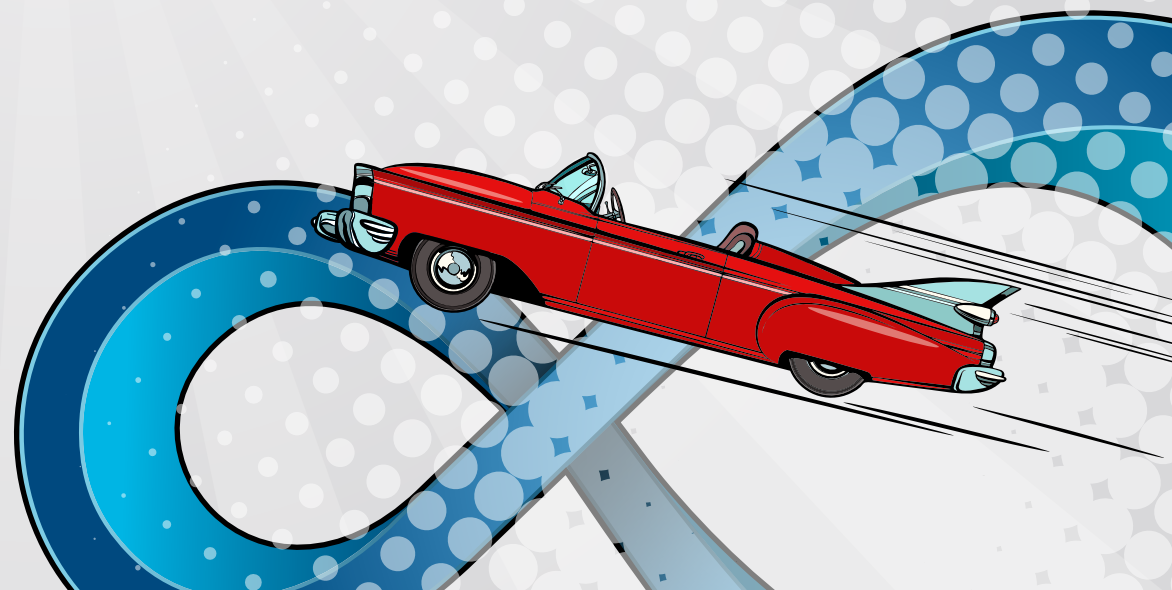
Stage 3 – Dismissal. Appropriate where there is further misconduct during the life of a final written warning, serious misconduct during the life of a warning or gross misconduct. Gross misconduct will usually result in immediate dismissal without notice or payment in lieu of notice.

Where a warning has expired it will remain permanently on your personnel file but will be disregarded in deciding the outcome of future disciplinary proceedings.

Alternatives to dismissal

If we think there is a workable alternative to terminating your employment we'll explore it with you and might decide to implement the alternative. Where we do you'll also receive a final written warning. Examples of alternatives to dismissal include:

- | | |
|--|---|
|  demotion |  transfer to another team or job |
|  loss of seniority |  loss of future pay, increment or bonus |
|  reduction in pay |  period of suspension without pay |



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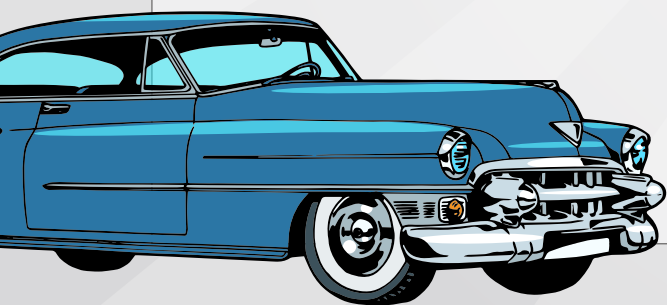
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Disciplinary Policy

(Formal Stage) *continued*

We can't capture every scenario but we've set out some examples below as a guide – the lists aren't exhaustive.

MISCONDUCT	GROSS MISCONDUCT
<ul style="list-style-type: none"> • Minor breaches of our policies; • Minor breaches of your contract of employment; • Poor timekeeping; • Excessive use of our telephones for personal calls; • Excessive personal email or internet usage; • Time wasting; • Unintended damage to our property; or • Negligence in the performance of your duties. 	<ul style="list-style-type: none"> • Serious or repeated breaches of our policies, employment contract or our values; • Obscene language or other offensive behaviour; • Unauthorised absence from work; • Repeated or serious failure to obey instructions, or any other serious act of insubordination; • Causing loss, damage or injury through serious negligence; • Unlawful discrimination or harassment; • Serious misuse of our property or name; • Deliberately accessing internet sites containing pornographic, offensive or obscene material; • Theft or fraud; • Dishonesty; • Actual or threatened violence or behaviour which provokes violence or bullying; • Bringing our organisation into serious disrepute; • Being or appearing to be under the influence of alcohol, illegal drugs or other substances during working hours; • Unauthorised use, processing or disclosure of personal data; • Use or disclosure of confidential information intentionally or otherwise directly or indirectly.



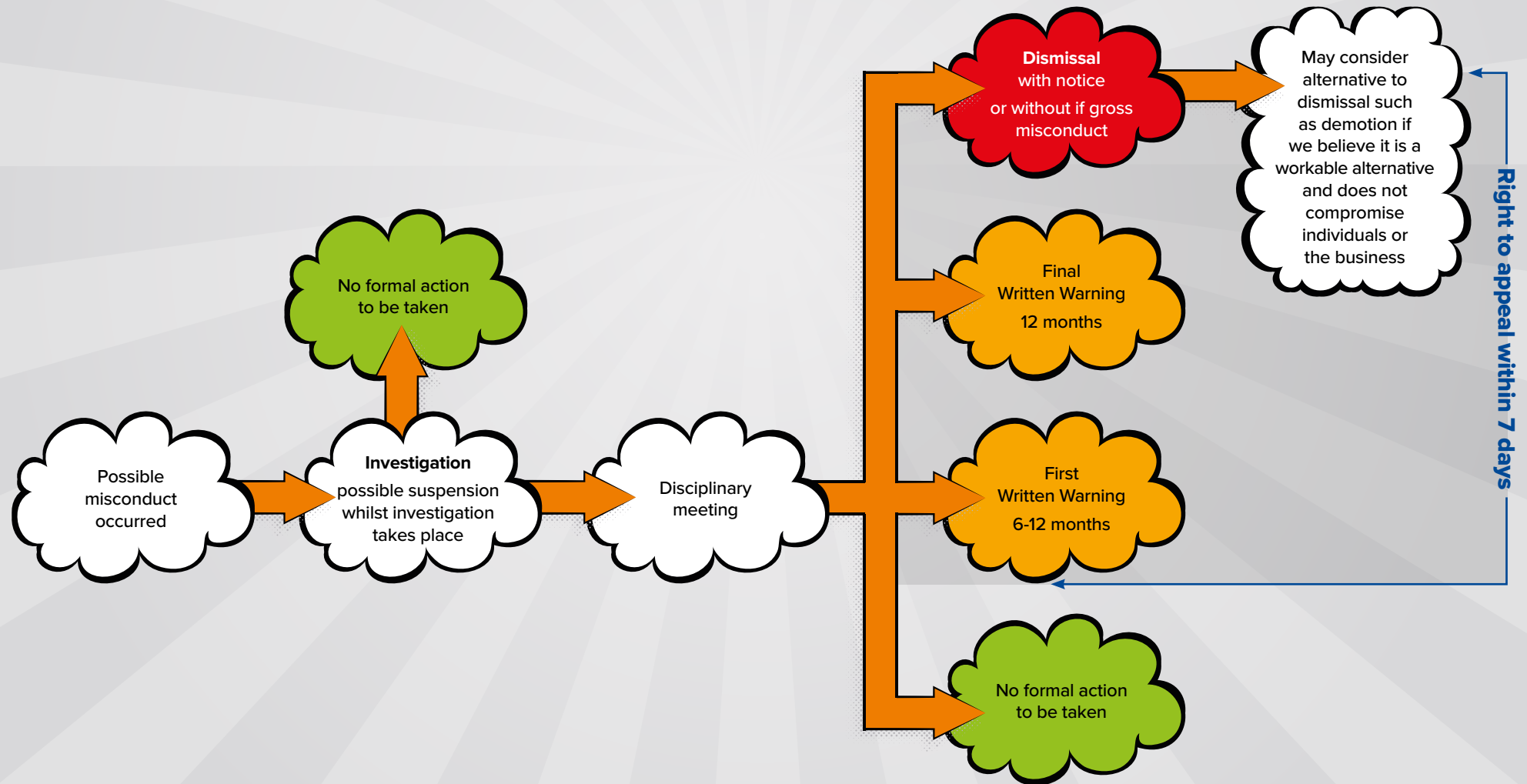
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Disciplinary Process Flowchart

Supported by Disciplinary Policy



Examples of documentation

Performance Improvement Meeting (Informal Stage)

DATE

NAME

ADDRESS

By hand/email/1st class post (delete as appropriate)

Dear NAME

Performance Improvement Meeting – Informal Stage

Following our conversation on DATE, I would like to confirm that your performance improvement meeting is arranged on DATE, at TIME, at LOCATION.

As we discussed your performance needs to improve in the following areas:
(list all areas which need improvement)

- 1.
- 2.
3. (continue with as many points as relevant)

I attached a Performance Improvement Plan form for you to complete during the meeting. Please prepare a list of all actions you propose to take and any support/training you may need from myself or the Company to make these improvements.

We will discuss your proposal at the meeting and agree your Performance Improvement Plan.


I trust that the above is clear but if not please do not hesitate to contact me should you have any questions prior to the meeting.


Yours sincerely

NAME
POSITION
For and on behalf of Motorpoint

Enc: Performance Improvement Plan form

Cc: Personnel File


THE CAR SUPERMARKET
MOTORPOINT LTD
HR & Training
Unit 7, Prime Enterprise Park, Prime
Park Way, Derby, DE1 3QB
TEL: 01332 347357
WWW.MOTORPOINT.CO.UK



Registered Office: Chertwell Drive, West Meadows, Derby, DE21 6BZ England – Registered Number: 3462801 VAT Reg No: 241 2346 43

Invite to
PI meeting

**Blank PIP
template**

PERFORMANCE IMPROVEMENT PLAN

Date started:

Date to be completed:

OBJECTIVE/TARGET	ACTIONS TO COMPLETE FOR EACH OBJECTIVE/TARGET	MEASURE /EVIDENCE OF COMPLETION	SUPPORT (coaching, training, specialist help etc.)	REVIEW DATE	DATE TO COMPLETE	MANAGERS COMMENTS ON PROGRESS




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Examples of documentation

Performance Improvement Meeting (Informal Stage) *continued*


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MOTORPOINT LTD
HR & Training
Unit 7, Prime Enterprise Park, Prime
Park Way, Derby, DE1 3QB
TEL: 01332 347357
WWW.MOTORPOINT.CO.UK

DATE _____

NAME _____

ADDRESS _____

By hand/email/1st class post (delete as appropriate)

Dear NAME _____

Completion of Performance Improvement Plan

I am writing following the review of your Performance Improvement Plan on DATE.

You demonstrated significant improvement in all areas of concern and have achieved the standards required by the company. I am satisfied that your Performance Improvement Plan has been fully completed.

I trust that you will be able to sustain these improvements and consistently perform to these standards required for your role. However you should be aware that if at any time in the future your performance deteriorates again the company will evoke a formal stage of the Performance Improvement process. Please ensure that you raise with me any issues which may affect your performance as soon as they arise to they can be promptly resolved.

We will continue to discuss your performance, at our one-to-one meetings.

Yours sincerely _____


NAME _____

POSITION _____

For and on behalf of Motorpoint

cc Personnel file

Registered Office: Charwell Drive, West Meadow, Derby, DE21 6BZ England - Registered Number: 3482051 - VAT Reg No: 241 2346 45



PIP Satisfactory Outcome




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Quick links:



Examples of documentation

Performance Review Meeting (Formal Stage)


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MOTORPOINT LTD
HR & Training
Unit 7, Prime Enterprise Park, Prime
Park Way, Derby, DE1 3QB
TEL: 01332 347357
WWW.MOTORPOINT.CO.UK

DATE

NAME
ADDRESS

By hand/email/1st class post (delete as appropriate)

Dear NAME

Performance Review Meeting – Formal Stage

I am writing to ask you to attend a meeting at TIME on DATE at LOCATION to discuss your performance. I will be accompanied by NAME who will take notes at the meeting but will not take part in the decision-making process.

The meeting is to consider whether your performance has fallen below the required standard, the reasons for this and what action (if any) needs to be taken.

I am concerned about your performance for the following reasons:

1. insert details of standard required and how it is alleged that the employee's performance has fallen below that standard (including details of any previous targets set as a result of poor performance)
2. insert details of standard required and how it is alleged that the employee's performance fell below that standard (including details of any previous targets set as a result of poor performance)


I enclose the following evidence which will be referred to at the meeting:

1. Evidence
2. Evidence
3. Evidence

If there are any further documents you wish to be considered at the meeting, please provide copies as soon as possible and no later than three working days prior to the meeting. If you do not have copies of those documents, please provide details so that they can be obtained where possible.

You are entitled to call any relevant witnesses to the meeting; please let me have their names as soon as possible and no later than three working days before the meeting so that I can make the necessary arrangements. If I do not consider that the witnesses are relevant to the performance issues to be considered then you will not be permitted to call them.

You are entitled to bring a fellow employee or a trade union representative to the meeting. If you wish to bring a companion, please let me know their name as soon as possible and no later than three working days before the meeting so I can make arrangements where that companion is a

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colleague of yours. If I think the person you choose is not appropriate to be your companion, I will ask you to choose someone else. Please note your companion will not be permitted to answer questions on your behalf.

As a result of the meeting [you may be set targets for improvement] [and] [you may be issued with a first performance warning.] OR [as you are currently subject to a first performance warning for poor performance you may be issued with a final performance warning.] OR [as you are currently subject to a final performance warning for poor performance your employment may be terminated.] OR we may discuss demotion as a possible outcome if there is a suitable position available within the business.

Please let me know immediately if you are not able to attend the meeting, giving your reasons. If you fail to notify me that you are not able to attend then the meeting will go ahead without you.

After the meeting, I will notify you in writing of my decision and give you the right of appeal if formal action is taken.

Yours sincerely

Name
Position
For and on behalf of Motorpoint

Invite to
Performance
Review Meeting



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Examples of documentation

Performance Review Meeting (Formal Stage) *continued*

DATE

NAME

ADDRESS

By hand/email/1st class post (delete as appropriate)

Dear NAME

Outcome of Performance Review Meeting – Formal Stage

I write to confirm the outcome of the meeting to discuss your performance held on [DATE].

You attended the meeting with [name] OR You decided to attend the meeting without a companion.

I attended the meeting with [name] to take notes of our discussion. I enclose a copy of the notes for your information. If you have any amendments that you would like reflecting in the notes, please handwrite them on to the notes and return them to me within seven days.

Your performance has been unsatisfactory in the following respects:

1. [Summarise findings in relation to each allegation of poor performance using evidence and in particular taking into account the employee's explanations and any suggestions they have that the lack of training, equipment or mentoring caused the poor performance;]
2. [Summarise findings in relation to each allegation of poor performance using evidence and in particular taking into account the employee's explanations and any suggestions they have that the lack of training, equipment or mentoring caused the poor performance.]


I have decided to set you the following targets:

- a. [Details];
- b. [Details];
- c. [Details].

During our meeting you did not suggest anything that we could be doing differently to assist you in the achievement of your targets. OR During our meeting you suggested [details] that we could be doing to assist you in achieving your targets. I have considered your suggestions and [explain whether you are able to meet with any requests of the employee. If you are not, explain why not.]

You will be given a first performance warning OR final performance warning as a result of poor performance to last for twelve months. During this period your performance will be monitored on a weekly and monthly basis with a view to ensuring that you are reaching the targets which have been set.

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OR

Your employment must be terminated on grounds of poor performance. You were subject to a final performance warning that was issued on [date] which explained that unless your performance improved sufficiently during the period of the final performance warning your employment may be terminated.

It is clear to me that your performance hasn't improved sufficiently for the reasons set out above and unfortunately I consider that there is no alternative but to bring to an end your employment as a result of the strain that your underperformance is putting on your colleagues/ as our organisation can't continue to support you if you are not performing/ any other reasons you have to being unable to continue with the under-performance.

The following arrangements apply to the termination of your employment:
HR will prepare this letter and include all terms relating to the termination of employment

OR

If we have decided to demote, HR will support you with this

You have the right to appeal against this decision. If you wish to appeal, you must do so in writing to a director within seven days. You must state clearly your grounds for appeal in full.

If you have any questions regarding this letter please contact me.

Yours sincerely

[Name]
[Position]
For and on behalf of [organisation]

Encl: Meeting notes
[Contract of employment if applicable]

Outcome of
Performance
Review Meeting



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#DrivingDreams



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