

Conducting a Performance Improvement Plan

Identify the Reason for the PIP

Performance Improvement plans are formal “corrective” actions where there is an issue with an employee’s performance or behaviour. They can also be as of the result of a disciplinary outcome.

The PIP is applied if the informal approach to resolving Behavioural & Performance issues have not been successful or as a result of a disciplinary finding of sub-standard performance.

This is a formal process and should be fully documented.

Gather Data Specific to The Issues

Preparation is the key to a successful PIP process. The areas of underperformance should be measured and exemplified so the employee can understand the issue and the manager can clearly outline the problem.

This will also afford all the parties the opportunity to resolve the matter in a suitable and timely manner.

Identify KPIs

Once the areas of underperformance have been identified, the existing Key Performance Indicators should be reviewed by management and confirmed to the employee. The manager should have data supporting the KPIs in case the employee states that they are not achievable. Where possible the performance levels of an *unidentified* member of the team in a comparable role should be considered when developing targets.

Phased Performance Increase

Given that the employee has not been operating at the required level there is no point in expecting them to be able to achieve 100% of their targets at the outset of this process. Therefore, management should identify agreeable performance levels for each of the stages that will increase incrementally until they are at the desired level. Suggested increments are as follows:

- Stage 1 (80% KPIs)
- Stage 2 (90% KPIs)
- Stage 3 (100% KPIs)

Conducting the Review

The meeting should occur in a formal setting (the employee should be invited in writing / there should be notes taken / there should be a record of the meeting issued afterwards) however unlike in a Grievance or Disciplinary situation, the employee is not afforded the right to representation.

The meeting should be conducted in a non-critical and constructive manner and all the points discussed should be constructive.

The goal of this process is to ensure that the actions taken are corrective and that the employee is given the opportunity and support to achieve the correct performance / behavioural standards.

Next Steps

Ideally the employee will follow the process and achieve the targets and, in the event that they fail a stage it should be repeated. There should be a review of the suitability of the process and if

necessary, the process should be amended accordingly. If the process is deemed suitable the employee should be advised as much and notified that should they fail the process a second time that this will be referred directly to a disciplinary review.