

Underperformance meeting plan - template

You can use this template to help you prepare for a formal underperformance meeting. We recommend that you use this plan in conjunction with our Managing underperformance – the formal steps checklist

Conducting a formal underperformance meeting will make sure your employee:

- has a clear understanding of what's required of them
- has a documented plan for improving their performance
- is aware of the consequences if their performance doesn't improve.

This template has been colour coded to help you complete it. You simply need to replace the red < > writing with what applies to your employee and situation.

Explanatory information is shown in *blue italics* to assist you and should be deleted once you have completed the agreement.

Suggested steps for developing an underperformance meeting plan

For more information on managing underperformance, see our online learning courses at www.fairwork.gov.au/learning. For information about minimum employment rights and entitlements you can also call the Fair Work Infoline on 13 13 94 or visit www.fairwork.gov.au.

Step 1: Before the meeting

Before the underperformance meeting, you can use the template to record the details of the meeting.

- When and where you will meet with your employee
- Who will attend the meeting.

Attendees will include you and the employee, any witness / note-taker that you ask to attend the meeting and any support person (eg. a co-worker, family member, friend or union representative) that the employee chooses to bring to the meeting.

Also use the plan to prepare a summary of:

- Why you are meeting with the employee – what the underperformance issue is and why it's an issue. Use specific examples and focus on facts
- What steps that you've taken in the past to resolve the issue (eg. feedback and warnings) as well as any support that you've provided (eg. training)
- How you would like to move forward with the employee at this point in time, including any further support or assistance that you will provide.

Use dot-points so you have the information you need clearly set out in front of you. Make sure you take any relevant paperwork with you (e.g the employee's performance agreement, job description and any performance improvement plan) and any documents that demonstrate the underperformance (eg. work examples, customer complaints or performance statistics).

Step 2: During the meeting

During the meeting, use your summary to guide what you say to your employee, and to make sure you cover everything you need to.

Don't read from the summary like a script, though. You might think of other things you need to cover, and you need to give the employee a chance to contribute.

Make sure you invite the employee to respond to what you've said and give them the opportunity to explain their performance. Ask them what they think can be done to improve their performance. Keep an open mind, actively listen, and ask open questions when you want to find out more. What the employee says may influence how you decide to move forward with the employee.

Step 3: After the meeting

Immediately after the meeting, make thorough notes of what was discussed in the meeting, including anything that you covered that wasn't in your summary, as well as anything the employee said.

The Fair Work Ombudsman is committed to providing you with advice that you can rely on.

The information contained in this template is general in nature. If you are unsure about how it applies to your situation you can call our Infoline on 13 13 94 or speak with a union, industry association or a workplace relations professional.

UNDERPERFORMANCE MEETING PLAN

Details	
Date:	<date>
Time:	<time>
Location:	<location>
Attendees:	<attendees>
Reason for the meeting	
<p><reason></p> <p>eg.</p> <ul style="list-style-type: none">• Sean – ongoing lateness.• Late for work four out of five mornings last week. Shift starts at 10.00 am: Monday, Tuesday and Thursday – arrived at work at 10.15 am; Friday – arrived at work at 10.30 am.• This means no-one to cover start of shifts: call wait times are longer, customers are complaining, other team members have to carry the workload and are getting stressed, KPIs are not being met.	
Background	
<p><background></p> <p>eg.</p> <ul style="list-style-type: none">• Raised issue of lateness twice this month at weekly catch-ups (3/2 and 10/3) – no reason given.	

Details

- On 3/2 also offered swap to afternoon shift if more suitable – declined.
- On 10/3 gave verbal warning.

Next steps

<next steps>

eg.

- First written warning.
- Put performance improvement plan in place: arrive at work on time for the next six weeks; communicate unexpected and unavoidable lateness (e.g. train delays) to supervisor by phone as soon as possible.
- Schedule meeting for 28/04 to review performance. If not enough improvement by then, final written warning.

Task list	Due date
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<task>

Make a list of what you need to do next, and by when.

eg. Make record of meeting; provide copy to Sean and ask him to sign.

<date>

eg. Tomorrow.

eg. Prepare first written warning; provide copy to Sean and ask him to sign.

eg. Tomorrow.

eg. Prepare performance improvement plan; provide copy to Sean and ask him to sign.

eg. End of week.

eg. Schedule meeting with Sean to review performance; also review in the meantime during weekly catch-ups.

Eg. 28/04.