

PERFORMANCE COUNSELING CHECKLIST

	Yes	No
Have you had at least two informal discussion?	Yes	
Have you provided enough support and training to the employee?	Yes	
Have you clearly set expectations of the position to the employee?	Yes	
Have you gathered enough evidence regarding their deficiencies in performance/ behaviour (specific examples, events and your observations)?	Yes	

If yes, continue with the formal process.

	Yes	No
1. Give the employee a letter requesting a meeting for a Formal Performance Discussion. Contact HR for the Template.		
2. Have two managers in on the discussion in a private room where no one will interrupt.		
3. Explain the nature of the concern. <ul style="list-style-type: none"> • Focus on behaviour and/or performance – give examples • Make sure you understand the concern clearly 		
4. Encourage the other person to talk. <ul style="list-style-type: none"> • Use your active listening skills • Ask open and probing questions 		
5. Explain the requirements, what needs to happen and the outcomes. <ul style="list-style-type: none"> • Define the reason for the discussion • Avoid judgmental words like should, must or ought • Use your assertive “I” language 		
6. Ask for suggestions. <ul style="list-style-type: none"> • What can we do? Have suggestions ready. • Encourage the employee to identify alternatives to solve problem or resolve issue. 		
7. Adjourn meeting <ul style="list-style-type: none"> • Discuss with each other whether or not to issue a formal warning (is their response reasonable?). If you decide to issue a formal warning contact HR to draft a formal warning letter. • Re-adjourn with a copy of the letter 		

<p>8. Go through the letter and agree on action steps.</p> <ul style="list-style-type: none"> • Be specific • Set time frames • Go over expectations • Check for understanding 		
<p>9. Offer support.</p> <ul style="list-style-type: none"> • Be positive • Demonstrate empathy and show confidence in their ability to solve problem • Provide support and resources where appropriate 		
<p>10. Type up notes taken in the discussion and provide a copy to the employee to sign.</p>		
<p>11. Get employee to read and sign Formal Warning letter.</p>		
<p>12. File copies of:</p> <ul style="list-style-type: none"> • Letter to request discussion • Formal warning letter • Signed copy of notes taken of discussion held 		

SAMPLE