TEMPLATE 3

Performance Issue One-on-One

PURPOSE: *Address a specific performance problem directly and respectfully, agree on the problem, and leave with a plan, a timeline and a follow-up date.*

Employee: *Enter name*	**Manager:** *Enter name*	**Date:** *MM/DD/YYYY*	**Duration:** *30–45 min*

OPENING

"I want to talk about *[specific performance issue]*. This is important for your success and the team's success. I want to understand your perspective and work together on getting back on track."

THE ISSUE

Specific behavior/outcome	*What you observed, not your interpretation of it*
Impact	*On the team, the work, customers or colleagues*
Expected standard	*What good looks like in this role*

THEIR PERSPECTIVE

"Help me understand what's happening from your point of view."

- ☐ Listen actively
- ☐ Ask questions to understand context
- ☐ Avoid defensiveness

THEIR PERSPECTIVE — NOTES

ROOT CAUSE EXPLORATION

What's contributing to this?

Are there obstacles I'm not aware of?

What support is missing?

Is this a skill issue, motivation issue, or external factor?

AGREEMENT ON THE PROBLEM

> "So we agree that *[restate issue]* is happening and needs to change. Is that accurate?"

ACTION PLAN

Specific changes needed	*Observable, concrete behaviors or results*
Support I'll provide	*Coaching, resources, removing obstacles*
Timeline for improvement	*By when*
How we'll measure progress	*What evidence will show it is working*
Consequences if improvement doesn't happen	*State them plainly and kindly*
Follow-up: check-in meeting	*Date in 1–2 weeks*
Follow-up: formal review	*Date in 30 days*

CLOSING

> "I believe you can turn this around, and I'm committed to supporting you. This is a teachable moment for both of us, let's learn from it together."

Watch-Out: Agree on the problem before you plan the fix. If you skip to the action plan while they still disagree the issue exists, nothing you write below it will stick.