TOOL 9

Performance Issue Documentation Log

> **PURPOSE:** *Keep a clear, objective record of a performance issue and each conversation about it. This protects both you and the employee.*

Employee: *Enter name*	**Manager:** *Enter name*	**Date:** *MM/DD/YYYY*

ISSUE DESCRIPTION

The performance issue	*Specific, objective description: what happened, when, and the standard it fell short of*

PREVIOUS DISCUSSIONS

Date	Brief summary of what was discussed

TODAY'S CONVERSATION

Date and time	
Location	*In-person, video, or phone*
Issue discussed	*Detailed notes on what you discussed*
Employee's response and perspective	*Their explanation, context, or viewpoint, in their words where possible*

AGREED-UPON ACTIONS

Owner	Action item	Due date

TIMELINE AND CONSEQUENCES

Timeline for improvement	
Next check-in	*MM/DD/YYYY*
Consequences discussed	*If applicable: what happens if improvement doesn't occur*

FOLLOW-UP ACTIONS

- ☐ Send follow-up email summarizing the conversation
- ☐ Share with HR (if appropriate)
- ☐ Schedule next check-in meeting
- ☐ Provide resources and support discussed

FOLLOW-UP ACTIONS — NOTES

Pro Tip: Send a follow-up email after the conversation summarizing key points and agreements. It confirms a shared understanding and completes the record.