

Performance Improvement Plan Preparation Checklist

Use this checklist to organise the information, support and discussion needed before an organisation-defined performance improvement process.

Details

EMPLOYEE	ROLE
MANAGER	PLANNED MEETING DATE

Before starting

☐	Clearly identify the performance concern
☐	Identify the expected standard
☐	Gather relevant evidence and examples
☐	Review previous discussions and support
☐	Consider whether expectations were clear
☐	Draft reasonable improvement objectives
☐	Consider support, resources and training
☐	Consider an appropriate review period
☐	Plan review and check-in points
☐	Check the relevant organisational policy and process
☐	Consider relevant individual circumstances

Prepare for the discussion

☐	Explain concerns specifically and objectively
☐	Allow the employee to respond and contribute
☐	Clarify expectations and how evidence will be reviewed
☐	Discuss available support and resources
☐	Explain the review arrangements
☐	Record the discussion and next steps

Notes and evidence to have available

USE THIS RESOURCE CAREFULLY This checklist supports preparation only. It does not determine whether a PIP is appropriate or fair, whether improvement is sufficient, or what outcome should follow.

FREE INTERACTIVE TOOL PIP Review Planner | </free-tools/pip-review-planner>

COMPLETE PAID WORKFLOW Performance Improvement Plan Toolkit | </toolkits/performance-improvement-plan>