Training Programme

Develop- Mock Template of a Performance Improvement Plan Industry 4.0

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**Project Name:** Bridging the gap between VET and business: Modern talent management and analytics 4.0 for SMEs in Europe  
**Project Acronym:** Talent 4.0  
**Project Number:** 2018-1-AT01-KA202-039242

**Performance Improvement Plan FORM**

**Name:**

**Position:**

**Supervisor:**

**Start Date: Review Date:**

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| --- | --- |
| **Describe the performance problem in precise terms:** | |
| **Provide reasons for underperformance:** | |
| **State agreed performance objectives:** | |
| **Objectives** |  |
| **Measures of Success** |  |
| **Due Date** |  |
| **Agreed Actions to be taken by the Management to support improvement** | |
| **State the consequences of insufficient performance improvement** | |
| **Employee and Manager comments about the PIP:** | |
| I acknowledge receipt and understanding of the plan and hereby that the PIP process has been fully explained to me.  □ Agree with the plan □ Disagree  **Date:**  **Signature** | |
| **Progress at the end of Performance Improvement Plan period**  (to be filled by Management) | |

**EXAMPLE - Performance Improvement Plan**

**Name:** Joe Bloggs

**Position:** Finance Accountant

**Supervisor:** Tom Higgins

**Start Date:** 1st July **Review Date:** 31st October

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| **Describe the performance problem in precise terms:**  Specifically, the issues of concern during the budget review were as follows:  • The guidance notes sent to those required to contribute were confusing and lengthy and as a result some key points were missed  • The deadlines given were unrealistic considering the amount of work involved, something which created a lot of frustration for those asked to comply  • The running of the budget review sessions within departments was not regarded as satisfactory by several heads of function.  • Overall, the lack of sufficient preparation meant that the numbers produced were not accurate in several cases and these mistakes were not identified within Finance beforehand. | |
| **Provide reasons for underperformance:**  The work involved was underestimated resulting in too many items done in a rush. | |
| **State agreed performance objectives:** | |
| **Objectives** | • have a clear grasp of the budget review process  • able to facilitate groups and achieve the right results  • take negative feedback and turn it into an opportunity to make new improvements  • demonstrate a constructive attitude in dealing with people outside the Finance function |
| **Measures of Success** | • clear communication to those participating  • a timetable issued well in advance of the next budget review  • better facilitation of the departmental meetings |
| **Due Date** | 31st October |
| **Agreed Actions to be taken by the Management to support improvement**  • Spend one week working with Anna Mateus to go through all aspects of the budget review currently being undertaken for the Operations business. Under Anna’s guidance you will observe several of the sessions and then run three sessions yourself as a leader.  • Visit all of the unit heads to respond to their critique points and then work these into an improvement plan and communicate it. | |
| **State the consequences of insufficient performance improvement**  As this is a key part of the role, addressing this issue is of critical importance, and the consequences of not doing so will lead to us having to end your employment in this role. Therefore, it is expected to see marked improvements within the above time-scale in order to avoid having to treat this more seriously. | |
| **Employee and Manager comments about the PIP:** | |
| **Employee comments about the PIP:**  I agree with my manager’s feedback and am committed to take the agreed actions to improve my performance. | |
| **Manager comments about the PIP:**  I am happy that Joe is open to the feedback provided and have faith in him to improve on the set objectives. I am available to provide support and guidance wherever needed. | |
| **I acknowledge receipt and understanding of the plan and hereby that the PIP process has been fully explained to me.**  **□ Agree with the plan □ Disagree**  **Date:**  **Signature** | |
| **Progress at the end of Performance Improvement Plan period**  (to be filled by Management)  Having met with Joe on the agreed deadline I have discussed with him how he has improved immensely. He has taken the negative feedback and learnt from it, using it constructively to proactively answer budget queries from non-Finance colleagues. This showed that he has full and clear grasp of the budget review process while at the same time being able to communicate this to others and show them how to best achieve the required right results for minimising budget expenditures. | |

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