Performance improvement plan email

Send the meeting invitation a day or two before the conversation, never the PIP itself as a surprise. Send the written plan within one business day after the meeting, then check-in notes after each review.

PIP MEETING INVITATION

Subject: Meeting on [Meeting Date] to discuss your performance

Hi [First Name],

I'd like to meet with you on [Meeting Date] at [Meeting Time] in [Location or Video Link] to talk about your performance in [Area, e.g. call quality and schedule adherence] and a plan to help you meet expectations.

[HR Partner Name] from HR will join us. We'll go over where things stand, the specific goals for the next [Plan Length], and the support we'll provide. You'll have time to ask questions and share your view.

If you need an accommodation for the meeting, or if there's something affecting your work you'd like us to know about, tell me or [HR Partner Name] before then.

[Manager Name]
[Title], [Company]

WRITTEN PLAN AFTER THE MEETING

Subject: Your performance improvement plan: [Start Date] to [End Date]

Hi [First Name],

Thanks for meeting with [HR Partner Name] and me today. As discussed, this email and the attached plan confirm your performance improvement plan, which runs from [Start Date] to [End Date].

Where performance needs to improve:

- [Gap 1, with data, e.g. quality score averaged 72% over the last 8 weeks against a target of 85%]
- [Gap 2]

What success looks like by [End Date]:

- [Measurable Goal 1]
- [Measurable Goal 2]

Support we'll provide: [Support, e.g. two side-by-side coaching sessions a week with Team Lead Maria Lopez, refresher module on call handling].

We'll review progress on [Check-In Dates]. If you meet the goals, the plan closes and we go back to regular check-ins. If performance doesn't reach the required level, further action may follow, up to and

including termination of employment.

Please sign the attached plan to confirm you've received it. Signing doesn't mean you agree; you can add written comments, which will be kept with the plan.

I want this to work, and I'll do my part.

[Manager Name]
[Title], [Company]

CHECK-IN SUMMARY

Subject: PIP check-in notes: [Check-In Date]

Hi [First Name],

Summary of today's check-in on your performance improvement plan:

- Progress: [What improved, with numbers]
- Still below target: [What hasn't, with numbers]
- Next steps before [Next Check-In Date]: [Actions for employee and manager]

If anything here doesn't match your understanding, reply by [Reply Date] and I'll add your comments to the record.

[Manager Name]

SUCCESSFUL COMPLETION

Subject: Your performance improvement plan is complete

Hi [First Name],

I'm glad to confirm that you've met the goals in your performance improvement plan. Over the plan period your [Metric] went from [Starting Value] to [Ending Value], which is at the expected level for your role.

The plan is now closed. We'll keep meeting for regular 1:1s, and I expect you'll keep performing at this level.

Thanks for the effort you put in. It showed.

[Manager Name]
[Title], [Company]

SUBJECT LINE IDEAS

- Meeting on [Meeting Date] to discuss your performance
- Your performance improvement plan: [Start Date] to [End Date]
- Follow-up from today's meeting
- PIP check-in notes: [Check-In Date]
- Next review of your plan: [Next Check-In Date]
- Your performance improvement plan is complete

SMS / WHATSAPP VERSION

Hi [First Name], it's [Manager Name]. I've sent an email inviting you to a meeting with me and [HR Partner Name] on [Meeting Date] at [Meeting Time] about your performance and next steps. Please check your email and confirm you can attend.

Placeholders to replace: [First Name], [Manager Name], [HR Partner Name], [Meeting Date], [Meeting Time], [Location or Video Link], [Area], [Plan Length], [Start Date], [End Date], [Gap 1], [Measurable Goal 1], [Support], [Check-In Dates], [Check-In Date], [Next Check-In Date], [Reply Date], [Metric], [Starting Value], [Ending Value], [Title], [Company]