

What to Do If You're Called Into a Performance Meeting (AKA: Don't Let HR Play You)

I've sat in on a lot of Performance Improvement Plan (PIP) meetings as a union delegate, and let me be blunt—HR and management often use these meetings as a way to push people out. Too many times, I've seen employees get caught off guard, stress out, and say things that make their situation worse.

So, if you ever get called into one of these meetings, here's what you need to do to protect yourself:

1. Call Your Union ASAP

The second your boss asks for a meeting, contact your union. They'll probably ask you to write down what's been happening—focus on dates, times, and specific incidents. Avoid writing about "vibes"—HR doesn't care about feelings, and they will not work in your favor.

Having a union rep with you forces HR to play by the rules. If you don't have a rep, management knows they can push you around.

2. Ask for the Meeting Details in Writing

You (or your rep) should email HR and request:

1. A written agenda for the meeting
2. Any company policies relevant to the situation
3. Specific details on what will be discussed
4. A deadline for when they'll provide this information before the meeting

HR loves to catch people off guard. Getting the details in writing helps you prepare and stops them from shifting the goalposts mid-meeting.

3. Do NOT Admit or Apologise

Seriously—don't say "yeah, I'm sorry about that." HR will use it against you. Instead, if you're put on the spot, use these phrases:

- "I don't recall. I need time to think. Can I respond later in writing?"
- "I need to process this and can't respond on the spot. I'll come back to you on that."
- "I don't agree with that characterisation of events, but I'm happy to provide a response later."
- "Can I respond later in writing?"
- "I'm not able to respond right now. I need more time to consider this."

These responses buy you time and stop you from getting trapped into an answer you regret.

4. Listen to Your Union, Not Your Mates

Friends and family are great for venting, but they are not industrial relations experts. If you're in this situation, you need to follow your union's advice.

HR's whole strategy is to make the process so stressful that you don't fight back or escalate to a tribunal. If your goal is to stay in the job (at least until you find a new one), you need to stay calm, professional, and avoid giving them ammunition.

TL;DR:

- Call your union immediately, or if you haven't call them now. There is still time. Call them.
- Get the agenda & policies in writing before the meeting
- Do NOT admit fault or apologise
- Listen to your union rep, not your mates
- HR isn't your friend. Protect yourself.
- Keep notes in the meeting

What to Do If a “Regular Chat” Turns Into a Performance Meeting

Sometimes, HR or your manager will invite you for a “quick chat” or a “catch-up,” only for it to suddenly turn into a performance conversation. If you find yourself in this situation, here's how to handle it:

1. Recognise What's Happening

If the conversation starts shifting towards your performance, concerns about your work, or alleged issues, you're no longer in an informal chat—you're in a performance meeting. The moment you realise this, don't panic, but take control.

2. Pause the Conversation & Set Boundaries

You can say:

- “I wasn't aware this would be a performance discussion. I'd like to pause here and reschedule so I can prepare.”
- “This seems like a formal performance matter. I'd like to have my union rep or support person present before continuing.”
- “I need to take some time to consider what's been raised. Can we continue this at a later time?”

By doing this, you buy time and prevent yourself from being put on the spot. If they refuse, stay neutral—don't get defensive or admit anything.

3. Start Taking Notes Immediately

If you are refused and leaving the meeting is not safe or possible, document everything:

- Write down the exact wording of concerns being raised.
- Note the time, date, and attendees in the room.
- Do not admit or apologise, say little - advise that you need time to respond.
- If possible, email yourself a summary of what was said **not to your work email** afterward—this creates a timestamped record.
- Don't speak to others at work on what happened other than your delegate. This can be used against you. Choose one person, your delegate, to share and lean on. If you don't have one - make sure you don't give ammunition to HR by sharing details of the meeting with colleagues before you have union representation.

If they refuse to let you take notes, that's a red flag—mention this to your union later.

4. Be Strategic With Your Responses

If they ask you to comment on allegations or concerns, do not admit fault or apologise. Instead, use neutral, non-committal responses like:

- *"I wasn't prepared for this discussion. I'd like time to consider this and respond later."*
- *"I'd like to understand this in more detail. Can you provide the concerns in writing?"*
- *"I don't agree with that characterisation, but I'm happy to provide a written response after I've had time to reflect."*

These responses protect you from saying something that could be used against you.

5. Request Follow-Up in Writing

At the end of the meeting, say:

"I'd appreciate it if you could send me a written summary of what was discussed today."

"Can you confirm what the next steps will be, and when I can provide a written response?"

This forces HR/management to commit to a written record, which makes it harder for them to change their story later.

6. Contact Your Union Immediately

Once the meeting is over, get advice ASAP. Send them:

- Your notes from the meeting.

- Any emails or documents HR has given you.
- Your thoughts on what was said—but stick to facts over feelings.

Your union can guide you on the best next steps, whether that's pushing back, negotiating, or preparing a written response.

Final Thought:

If a casual chat suddenly shifts into a performance discussion, don't panic, don't engage too much, and don't get trapped into agreeing with anything.

1. Recognise what's happening.
2. Slow it down.
3. Take control.
4. Get everything in writing.
5. Contact your union.

HR is not your friend—they rely on catching you off guard. Protect yourself.

Email examples

Request for details (always check with your IO)

Subject: Request for Meeting Details and Relevant Policies

Dear [HR Representative's Name],

I hope you're doing well.

I wanted to check in regarding my upcoming meeting and ensure I have the right information to prepare effectively. Could you please confirm whether this meeting is part of a Performance Improvement Plan (PIP) process? If not, I would appreciate some clarity on what formal process this meeting falls under and any relevant policies that apply.

Additionally, I would be grateful if you could provide a summary of any specific concerns or topics that will be discussed. This will help me prepare thoughtful responses and engage constructively in the conversation. If possible, I would appreciate receiving this information at least 24 hours before the meeting to allow enough time to review and reflect.

Thank you for your time and support—I really appreciate it. Please let me know if you need anything further from me.

Best regards,

[Your Name]
[Your Position (if applicable)]
[Your Contact Information]

Follow up from surprise meeting

Request for details (always check with your IO)

Subject: Follow-Up on Today's Discussion

Dear [HR],

I wanted to follow up on our discussion earlier today. I wasn't aware that the meeting would cover [performance concerns/other topic], and I'd like the opportunity to review the details properly so I can provide a considered response.

Could you please provide:

- A written summary of the key points raised in the meeting
- Any relevant policies or documents referenced
- Clarification on the next steps and any expectations moving forward

I'd also appreciate some time to review this information and respond appropriately. I appreciate your time so the above will enable me to be prepared to engage fully in working together.

Best regards,

[Your Name]

Look after yourself

- Don't blame yourself or feel shame. But know you're not a helpless victim and you have agency to control your side of this process the best you can. Be empowered by the things you can do. Make arrangements that are practical and work with your union.
- Eat well, exercise, look after your needs and health. Your job is your wage, not your self worth. You fight for a wage, but keep your self worth about who you are not your job performance.
- Difficult times can make us stronger. This is a bad time, but it will end - and you will get through it. You have the strength, agency and solidarity to be on the other side. One day you will give advice to someone else.

