

Performance management

Performance Improvement Plan Template

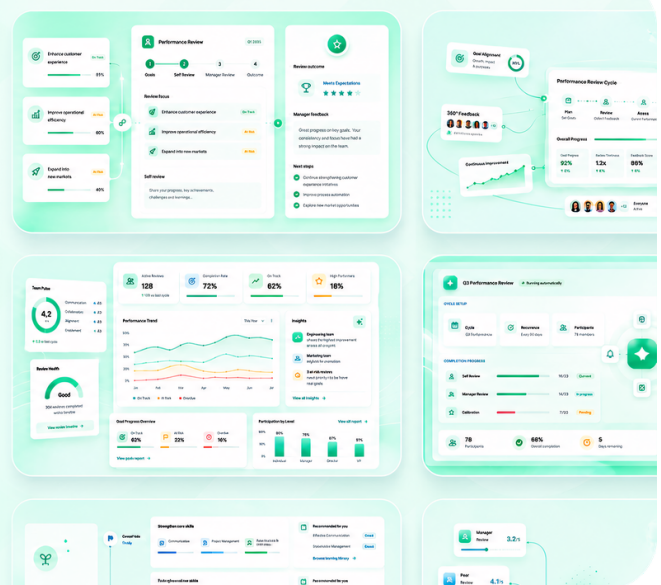
A structured plan for addressing documented underperformance fairly, with the readiness checks, evidence standards, and record-keeping that make a plan hold up if it is ever questioned.

Most improvement plan templates start at the form. A plan that holds up starts earlier than that, and the ones that fail usually fail on what happened before the document existed. Work through Section 0 before you write anything else.

PerformSpark

Performance Improvement Plan Template

Create actionable improvement plans with clear expectations, measurable goals, timelines, and ongoing manager support for success.

[Schedule a Demo](#)

Section 0. Before you write this plan

Four questions. If the answer to any of them is no, the plan is premature. Fix the gap first, or the plan will not stand.

- ☐ Has the expectation been communicated to this employee in writing, and can you point to when and where?
- ☐ Has informal coaching already taken place, and is there a record of it?
- ☐ Is this a documented pattern over time rather than a single incident?
- ☐ Would another employee in this role, performing at this same level, also be placed on a plan?

Why the fourth question matters

The first three protect the process. The fourth protects fairness. If you would not place a different employee on a plan for the same performance, you have a consistency problem before you have a performance problem, and the plan will be difficult to defend.

This is the individual-level version of the same test applied across an organization during rating calibration: is the standard being applied evenly, or is it moving depending on who is being assessed?

Section 1. Plan details

Employee name		Job title	
Department		Manager	
HR partner		Plan start date	
Plan end date		Plan duration	
Scheduled check-in 1		Scheduled check-in 2	
Scheduled check-in 3		Final review date	

Section 2. Performance gap

Complete one block for each area of underperformance. Keep the number of gaps small. A plan with six gaps is not a plan; it is a list of complaints, and an employee cannot act on it.

Gap 1

The expectation <i>The documented standard for this role, as it appears in the job description or team standard</i>	
What is happening <i>Observable and specific, with dates. What was done, or not done, and when</i>	
Business impact <i>What this costs the team, the customer, or the organization</i>	

Gap 2

The expectation <i>The documented standard for this role, as it appears in the job description or team standard</i>	
What is happening <i>Observable and specific, with dates. What was done, or not done, and when</i>	
Business impact <i>What this costs the team, the customer, or the organization</i>	

Copy the block above if a third gap is genuinely necessary.

Writing the gap so it holds up

The single most common reason an improvement plan fails is that it describes a person rather than a behavior. A character judgment cannot be verified, cannot be disproved, and cannot be improved. A fact can be all three.

Do not write	Write instead
Has a bad attitude	Interrupted colleagues in three of the last four team meetings (12, 19, 26 June) and declined two requests for assistance without explanation.
Is not a team player	Did not complete assigned handoff documentation for four files in June, requiring two colleagues to reconstruct it.
Lacks attention to detail	Seven member account records in Q2 contained data entry errors that required correction after submission.
Is unmotivated	Completed 4 of 11 assigned tasks by their due dates over the last 60 days.
Does not communicate well	Did not respond to three escalated member queries within the two business day service standard (dates).

The test

Read each statement back and ask whether a person who was not in the room could verify it from records. If they could not, rewrite it.

Section 3. Required improvement

For each gap, state the target, how it will be measured, and by when. If the employee cannot check their own progress against the target without asking you, the target is not specific enough.

Gap	Target to be met	How it will be measured	By when
1			
2			
3			

Section 4. Support the organization will provide

This is the employer's side of the agreement. It is the section most templates reduce to a single line, and failing to deliver stated support is the most common way an improvement plan is undermined later. Write only what will actually happen, and give every item an owner and a date.

Support to be provided	Owner	By when

Prompts, if useful:

- Training, coaching, or shadowing, and who will deliver it
- Access to tools, systems, information, or people the employee currently lacks
- Adjusted supervision or a temporary increase in check-in frequency
- A peer or mentor assigned for a defined period
- Anything the employee has identified as a barrier, and what is being done about it

Section 5. Check-in record

Complete each block during the check-in, not afterwards. A record reconstructed from memory weeks later is worth very little, and it shows.

Check-in 1

Date		Attendees	
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Progress against each target	
Evidence discussed	
Support delivered since last check-in	
Adjustments made	
Employee comments	
Manager comments	

Employee initials	Manager initials	Date
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Check-in 2

Date		Attendees	
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Progress against each target	
Evidence discussed	
Support delivered since last check-in	
Adjustments made	
Employee comments	
Manager comments	

Employee initials	Manager initials	Date
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Check-in 3

Date		Attendees	
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Progress against each target	
Evidence discussed	
Support delivered since last check-in	
Adjustments made	
Employee comments	
Manager comments	

Employee initials	Manager initials	Date
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Section 6. Possible outcomes

Name all four outcomes at the start of the plan, not at the end of it. This is the difference between a process an employee can engage with and a formality they can see through, and employees can almost always tell which one they are in.

Outcome	What happens next
Targets met	The plan closes. Performance is monitored through the normal review cycle. Confirm the close in writing.
Meaningful progress, targets not fully met	The plan is extended once, with a defined end date and unchanged targets.
Targets not met	Employment action proceeds in line with organizational policy.
The issue is skill or role fit rather than effort	The plan converts to a development plan, or a conversation about a different role.

Section 7. Final review

Final review date		Outcome	
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Summary of performance across the plan period	
Decision and rationale	
Employee response	

Section 8. Acknowledgement

Signature confirms that this plan has been received and discussed. It does not indicate agreement with its contents. The employee may attach a written response, which will be retained with this document.

Employee signature and date	Manager signature and date	HR signature and date

Section 9. Record keeping

Stored where		Access limited to	
Retention period		Review date	

Using this in PerformSpark

In PerformSpark, an improvement plan can be launched directly from the review that prompted it, so the plan carries its context from day one. Check-ins, evidence, and outcomes are held as a single record with a complete audit trail, and where the right outcome is growth rather than exit, the plan can be linked to a development plan.

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