**Tools For Firing an Employee With No Blowback**

**Discipline Written Warning**

**Written Warning**

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| --- | --- |
| ​**Employee Name:** | **Job Title:** |
| ​**Department:** | **Supervisor:** |
| **​Date:** |  |

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| --- | --- | --- |
| **\_\_  First Warning** | \_\_  **Second Warning** | \_\_  **Final Warning** |

The purpose of this written warning is to bring to your attention new or ongoing deficiencies in your conduct and/or performance. The intent is to define for you the seriousness of the situation so that you may take immediate corrective action. This written warning will be placed in your personnel file.

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| **Reason for warning** (violation of company policy or unsatisfactory performance/behaviors): |
| ​**Prior discussion or warnings on this subject** (verbal/written, dates): |
| **Relevant company policy violated:** |
| **Corrective action required:** |
| **Consequences of failure to improve performance or correct behavior:** |

The above has been discussed with me by my supervisor. I understand the contents and acknowledge and understand the corrective action required. I also acknowledge and understand the potential consequences of noncompliance.

**Signatures:**

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| --- | --- |
| Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date: \_\_\_\_\_\_\_\_\_\_ |
| Supervisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date: \_\_\_\_\_\_\_\_\_\_ |
| Division/Dept. Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Date: \_\_\_\_\_\_\_\_\_\_ |

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| Employee Name: |
| Manager Name: |
| Review Date: Date of Last Review |
| Monthly/Quarterly/Annual |

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| --- |
| Performance Rating |
| **DN – Development Needed**Does not Consistently meet established goals and client expectations. May not demonstrate Company Values consistently. | **FP – Full Performance**Meets established goals and client expectations. Demonstrates Company Values consistently. | **EP – Exceeds Performance**Consistently exceeds established performance goals, client expectations, and exemplifies Company Values. |

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| Competencies |
| **Professionalism** | Being polite, well-spoken, calm, and respectful to customers and co-workers |
| **Teamwork** | Work with other people & fostering relationships in a professional manner, |
| **Communication** | Communication Skills/Persuasion/Active Listening |
| **Accountability** | Delivering on commitments. Continuous personal development to improve |
| **Confidence** | Rejection Proof and controls the sales process to a successful close |

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| **Employee Reflection:** *Provide examples that demonstrate the use of competencies* | Rating |
|  | DN |
| FP |

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|  Performance Goals & Results  |
| **Performance Goals:** Identify performance goals.  |
| **Results:** Evaluate actual results and assign a performance rating. |

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| --- | --- |
| Performance Goal: | Rating: |
| DN |
| FP |
| EP |
| Employee’s Assessment of Performance: |
| Manager’s Assessment of Performance: |

|  |  |
| --- | --- |
| Performance Goal: | Rating: |
| DN |
| FP |
| EP |
| Employee’s Assessment of Performance: |
| Manager’s Assessment of Performance: |

|  |  |
| --- | --- |
| Performance Goal: | Rating: |
| DN |
| FP |
| EP |
| Employee’s Assessment of Performance: |
| Manager’s Assessment of Performance: |
|  |

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| Development |
|  *determine areas for further development and/or focus and how that will be accomplished.* |
| **Competency** | **Skills to Strengthen Competency** | **Development Tools** |
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| Performance Summary |
| *Brief narrative to support the performance ratings and summarize results.* |
| Manager Summary: |
| Employee Commitment to Action: (What Actions Will the Employee Take To Achieve Goals |
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|  |

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| --- | --- |
| Manager Signature: | Date: |
| Employee Signature: | Date: |
| HR Signature: | Date: |
| *Note: Manager, please forward this original, signed document to HR. Make copies for you and reviewee.* |

**Checklist: Employee Termination**

**Employee name:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Department:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Termination date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Type of Termination**

[ ]  *Voluntary:*

[ ]  Received employee’s resignation letter. (If verbal resignation, provided employee with a written confirmation of resignation).

[ ]  Exit interview scheduled. [ ]  Exit interview completed.

[ ]  *Involuntary:*

[ ]  Provided employee with termination letter.

[ ]  Provided employee with severance agreement if eligible.

 [ ]  Received signed severance agreement.

[ ]  Provided employee with WARN notice (if applicable).

**Benefits**

[ ]  Provided employee with termination/continuation of employment insurance benefits information (COBRA, life insurance, supplemental insurance, etc.)

[ ]  Checked FSA/HSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.

[ ]  Checked dependent care FSA participation and informed employee of remaining funds and reimbursement deadlines, if applicable.

[ ]  Checked PTO balance and informed employee of any remaining PTO and how it will be processed at termination of employment.

[ ]  Informed employee about retirement plan account options.

**Compensation**

[ ]  Provided notice of policy regarding any outstanding balances for money owed to company (e.g., educational loans/pay advances).

[ ]  Notified payroll department to process final paycheck.

[ ]  Informed payroll of any unused but earned PTO amounts due to the employee.

[ ]  Notified payroll to process severance pay and whether lump sum or salary continuation (if applicable).

**Contracts/Legal**

[ ]  Provided written notice to employee of any legal obligations that continue post-employment (e.g., noncompete/confidentiality agreements/employment contracts).

**Immigration**

[ ]  Notified company immigration attorney of termination if employee is on a temporary work visa.

**Records**

[ ]  Pulled personnel file to be stored with terminated employee files.

[ ]  Pulled Form I-9 to be stored with terminated employees’ I-9s.

[ ]  Obtained written authorization from employee to respond to employment verification requests.

**Information Technology**

[ ]  Disabled e-mail account.

[ ]  Removed employee’s name from e-mail group distribution lists; internal/office phone list; website and building directories.

[ ]  Disabled computer access.

[ ]  Disabled phone extension.

[ ]  Disabled voicemail.

**Facilities/Office Manager**

[ ]  Disabled security codes, if necessary.

[ ]  Changed office mailbox.

[ ]  Cleaned work area and removed personal belongings.

[ ]  Collected the following items:

[ ]  Keys ([ ]  office [ ]  building [ ]  desk [ ]  file cabinets [ ]  other)

[ ]  ID card

[ ]  Building access card

[ ]  Business cards

[ ]  Nameplate

[ ]  Name badge

[ ]  Company cell phone

[ ]  Laptop

[ ]  Uniforms

[ ]  Tools

[ ]  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Form co

Completed by:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Position Improvement Plan (PIP)**

**Team Member Name:**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Meeting Date**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Dept**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Supervisor Name**:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Standard(s) of Performance Reviewed:**(check all that apply):

|  |  |
| --- | --- |
| [ ] Time Management | [ ] Work Ethic/ Execution of  |
| [ ] Teamwork | [ ] Communication and Planning |
| [ ] Initiative | [ ] Integrity |
| [ ] Professionalism |

**Specific examples of current performance under review**:

**Improvement Plan** My Action Plan for Improved Performance (how will it be accomplished, and in what timeframe):

|  |
| --- |
|    |

**Acknowledgment:**

Team Member (signature):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor (signature):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Periodic Review Notes**

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| --- | --- | --- | --- |
| **Comments** | **Team Member Initials** | **Supervisor Initials** | **Date** |
| 1. |   |   |   |
| 2. |   |   |   |
| 3. |   |   |   |
| 4. |   |   |   |
| 5. |   |   |   |
| 6. |   |   |   |

**CHECK ONE:**
[  ]  Performance Action Plan satisfactorily completed on: \_\_\_\_\_\_\_/\_\_\_\_\_\_\_/\_\_\_\_\_\_\_

[  ]  Corrective Action Required *(attach and submit to Human Resources)*

Failure to meet and sustain improved performance may lead to further disciplinary action, up to and including termination. Corrective action may be taken in conjunction with, during, or after the performance plan.

**Reviewed and accepted by:**

**Team Member (signature):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Review completed by:

**Supervisor (signature):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Performance Action Plan reviewed by:

**HR (signature):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Behavior Competencies**

**Here are some of the top skills and characteristics of a good team member. Use these as the standard for interviewing and performance management as well.**

1. **Professionalism**

Being polite, well-spoken, calm, and presentable is all part of being professional at work.

1. **Work Ethic**

Hard Worker. Has a set of values centered on the importance of doing work and reflected especially in a desire or determination to work hard. Will do what it takes to get the job done.

1. **Results Focus**

Assumes a high level of accountability to achieve results with attention to detail. Exhibits a result-focused mindset that consistently raises the bar on performance expectations. Contributes and seeks methods to improve processes and execution for the organization.

1. **Honesty and integrity**

Telling the truth about tricky subjects, such as workload, work/life balance, difficult customers or colleagues, and ineffective procedures, makes for a good employee.

1. **Innovative ideas**

Someone who brings innovative ideas and suggestions forward that will impact positively. Is invested in the success and growth of the company.

1. **Analysis and Decision Making**

Problem-solving abilities. Employees who work on something until it’s solved or complete and who bring their best efforts to solve problems independently.

1. **Ambitious**

When employees have a clear, personal career plan or goal in mind, they’re not under the assumption that their employer will drive their career for them, so they strive for advancement.

1. **Time Management**

Prioritizes tasks so that they ensure they have enough time available to complete every project. Ensures the quality of their work increases when they are not rushing to complete it ahead of a deadline.

1. **Self-Accountable**

Dependability, reliability, and responsibility**.** Employees who take responsibility for their actions, are dependable, arrive on time, do what they say, and don’t let the others in their team down

1. **Conflict resolution**

Someone who can resolve conflict maturely, rather than trying to avoid it, by maintaining respect for those involved, not placing blame, and not acquiescing just to keep the peace. Says what is on their mind in a respectful, constructive manner

1. **Positive attitude**

Someone who brings a positive attitude to work and has a positive impact on those around them. Improves the energy in the team. Has good Emotional intelligence (EQ) and is about being mindful of their own state of emotions, as well as those in the team.

1. **Communication**

Conveys in a manner that is clear, persuasive, and sincere. Ensures others are informed. Uses the proper forms of effective communication.

1. **Customer Service**

Makes internal and external customer service an integral part of the organization’s culture. Anticipates and resolves customer service issues. Works to enhance the total customer experience.

1. **Teamwork.**

The ability to work with other people in a team by fostering relationships in a professional manner in order to achieve a common goal.

1. **Coachable**

Willing to learn and take feedback. Is willing to invest in learning hard skills and soft skills. They’re open-minded to new ideas.

1. **Generosity.**

Someone who will help, coach, and mentor those around them. They generously share their experiences and expertise. They understand that knowledge is only power when it’s shared with others.

1. **Detail-oriented**

Ability to follow detailed instructions. Rechecks work and are very accurate

**Management Role Competencies and Traits**

**Courageous Leadership**

Wins the trust and confidence of team members. Makes the best decision for the associate and the organization, even if that decision may be unpopular. Stands out as a leader amongst leaders. A strong role model who is transparent, candid, and resourceful.

**Teamwork**

Models effective collaboration and cooperation for the teams. Involves their team in strategies, tactics and goals. Supports others and is sought out by others as a “go-to” resource. Builds a values-driven culture.

**Analysis and Decision-Making**

Guides the team to reach solutions to complex problems. Mentors others to be great problem solvers.Solves problems at the root cause and does not use temporary fixes just to get by.

**Communication**

Conveys both simple and complex messages to the team in a manner that is clear, persuasive, and sincere. Ensures others are informed of corporate communications and external business conditions. Uses the proper forms of effective communication and avoids addressing the group with problems that mostly involve just a small number of employees. Praises and reprimands in the proper setting.

**Customer Service**

Makes internal and external customer service an integral part of the organization’s culture. Anticipates and resolves customer service issues. Works to enhance the total customer experience.

**Results Focus**

Assumes a high level of accountability to achieve results with attention to detail. Creates a result-focused team that consistently raises the bar on performance expectations. Seeks methods to improve processes and execution for the organization.

**Employee Development**

Recognizes unique talents and develops a diverse group of people for the organization. Creates and promotes an environment of development and continuous learning. Is effective at delegation and willing to share responsibility with direct reports for their personal improvement.

**Work Ethic**

Works as long and hard as it takes to accomplish goals and assignments. Has a set of values centered on the importance of doing work and reflected especially in a desire or determination to work hard. They will do what it takes to get the job done

**Professionalism**

Being polite, well-spoken, calm, and presentable is all part of being professional at work. Speaks with customers both external and internal with respect. Sets the proper example for leadership and confidence. Supports the company in words and actions. Does not display mood swings. Is calm and steady under pressure.