

Discussion Worksheet Pre-Meeting Checklist

Name of Employee: _____ Date: _____

Supervisor: _____

Types of Problem: Attendance Performance Behavior / Conduct

Dates of any previous discussions about the problem: _____

Basic Issue / Overall Concern: _____

Desired Performance: _____

Actual Performance: _____

Impact: (The good business reasons why the problem must be solved) _____

Consequences: (the logical consequences the individual will face if he / she fails to correct the situation)

The Five Classic Questions:

- Did the employee clearly understand the rule or policy that was violated?
- Did the employee know in advance that such conflict would be subject to disciplinary action?
- Was the rule violated reasonably related to the safe, efficient and orderly operation of the business?
- Is there substantial evidence that the employee actually did violate the rule?
- Is the action planned reasonably related to the seriousness of the offense, the employee's record with the organization, and to action taken with the employees who have committed a similar offense?

Action (This discussion is intended to be):

Performance Improvement Discussion Formal Disciplinary Action