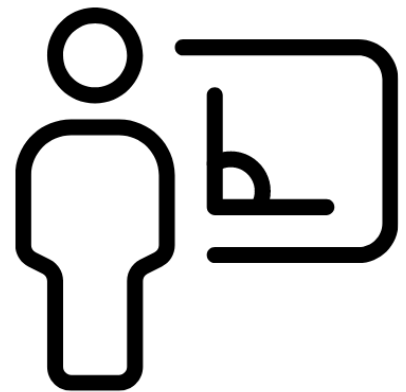


Instructors Guide



On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor for each lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



Effort only fully releases its reward after a person refuses to quit.

Napoleon Hill

Module Two: Placing an Employee on a Performance Improvement Plan (PIP) Before Firing



An employee performance improvement plan (or PIP), also known as a performance action plan, is a great tool to help employees that are struggling with performance, while still holding them accountable for their past mistakes. A PIP can help managers and employees determine a pattern of performance and can identify areas that may need more improvement than others. Through feedback and one-on-one communication, PIP should guide the employee toward the right track and away from any poor performance and inappropriate behaviors.

Justification



The first step to creating an effective PIP is to establish why the PIP is being implemented and what the employee should gain from it. Typically, PIPs are put in place when an employee is performing poorly. The PIP should be specific as to what areas need to change or improve, and should provide an outline to guide the employee. The manager should discuss with the employee why their performance needs to change and what will happen if it does not.

Estimated Time	8 minutes
Topic Objective	Discuss the justification of using a PIP.
Topic Summary	Justification Discuss ways a PIP is justified to improve employee performance.
Materials Required	Flipchart/board and marker

Planning Checklist	None
Recommended Activity	Discuss the various uses of a PIP. Did the participants believe they were effective or harmful to employees? Why or why not? Write some of their answers on the board/flipchart.
Stories to Share	Share any personal or relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Why is it important to establish the purpose of an employee PIP?

Validate



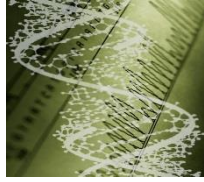
After the PIP has been fully explained, and the benefits and consequences defined, the manager should ensure that the employee understands why they are being placed on the PIP and if they know what is expected of them. Once the employee has been notified of their placement on a PIP, the manager should ask the employee if they have any initial questions or have any feedback they'd like to offer up front.

Some employees may wonder why they are on a PIP for certain behaviors and will need clarification on what actions are not working for them and what areas of behavior will need to change. The manager should always obtain some form of confirmation that the employee understands why the PIP is necessary and why they will need to participate.

Estimated Time	7 minutes
Topic Objective	Discuss the validation of using a PIP program.
Topic Summary	Validate Discuss the different ways to validate using a PIP with employees.
Materials Required	Worksheet 1: Why Use a PIP?
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.

Review Questions	How is a PIP validated with an employee?
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Include



The manager should bring out the basic guidelines of a PIP and should explain to the employee why the PIP is being utilized for them. While some actions are created by the manager for the employee to follow, it is important that the manager include the employee in ways of creating solutions to the problem. Ask the employee how they think the problem can be resolved and how they perceive putting their plan into action. If the employee is unsure how to handle the situation, or how to improve their problem, offer feedback and advice, but don't answer the problem for the employee. Allowing the employee to take part in their own PIP, allows them to have a greater stake in the plan and encourage their confidence about undertaking the changes outlined for them.

Estimated Time	8 minutes
Topic Objective	Discuss benefits of including employees in creating a PIP.
Topic Summary	Include Discuss the various methods an employee can take part in their PIP.
Materials Required	Flipchart/board and marker
Planning Checklist	None
Recommended Activity	Discuss different methods in which an employee can be included in their own PIP plan. Ask the class which areas the employee should be involved in and which areas are done by management only. Why or why not? Write some of their answers on the board/flipchart.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Why is it important for employees to be included in a PIP plan?

Be Grateful



Managers know that a PIP is best used for creating improvement methods for employees that are showing poor performance in certain areas. PIPs are most commonly associated with employee problem areas. However, when discussing a PIP with the employee, it is important to also include forms of praise and positive feedback as well as problem areas. Acknowledge the employee's prior achievements and give credit to their previous positive behaviors. Let the employee know that while you can recognize the good work they have done for the company, their recent behavior or performance has caught your attention and needs to be corrected right away. Employees will be more likely to fully participate if they know that their positive qualities are being noticed by management, and not just their negative aspects.

Estimated Time	7 minutes
Topic Objective	Discuss what it means to be grateful to employees.
Topic Summary	Be Grateful Discuss ways of being grateful for employee efforts and achievements.
Materials Required	Worksheet 2: Being Grateful
Planning Checklist	None
Recommended Activity	Complete the worksheet individually. Share your answers with the rest of the class.
Stories to Share	Share any personal, relevant stories.
Delivery Tips	Encourage everyone to participate.
Review Questions	Why is it important for employers to show gratitude toward employees?

Practical Illustration



Joseph was reviewing one of his employees, Yvonne, and noticed a trend of poor performance on her telephone surveys. She was taking too much time to complete the survey and was not gathering enough information from the caller. Joseph called a meeting with Yvonne to assign her to a performance improvement plan, or PIP.

Once in his office, Joseph reviewed the information he had with Yvonne and outlined what areas she needed to improve while on the PIP. Joseph made sure to compliment Yvonne on her great customer service skills and praised her ability to connect with the customer during her surveys. He asked her how she thought she could improve the problems she was having. Yvonne offered suggestions such as altering her script and learning better ways to lead the customer through the survey. Together, Joseph and Yvonne created a PIP that would help Yvonne improve her scores over the next six weeks. When finished, Joseph warned Yvonne that if she was unable to improve her scores within their timeframe, further disciplinary actions would occur and could lead to her eventual termination.

Module Two: Review Questions

1.) What is the first step in a Performance Improvement Plan?

- a) Notifying human resources
- b) Asking the employee for a solution
- c) Establishing the purpose
- d) Chastising the employee

One of the first steps to creating a PIP is to establish the purpose of the plan and why it needs to be established for the employee.

2.) For the PIP to be effective, it must be what?

- a) Specific
- b) Fun
- c) Long term
- d) Extracurricular

In order for a PIP to be considered effective, it must be specific about what the manager wants to employee to achieve, such as higher scores or increased productivity.

3.) For an employee to participate in a PIP, they must:

- a) Understand the process steps
- b) Be threatened with suspension
- c) Paid extra for their time
- d) Understand why they need to

If an employee is to participate in a PIP, they must first understand why they are involved with the PIP in the first place. They must know what is in it for them and why they should take the effort to participate.

4.) Validation answers which of the following employee questions?

- a) "Do I get paid extra for this?"
- b) "Why am I being placed on a PIP?"
- c) "What if I don't want to participate?"
- d) "When can I get off the PIP?"

The validation process beings to involve the employee in the PIP. Validation defines to the employee why they are on the PIP and what is initially expected of them.

5.) An employee should be included when trying to create what portion of the PIP?

- a) The solution
- b) The problem
- c) The process steps
- d) The discipline

Employee involvement in the PIP is very important, especially when creating an end solution. Employees must be involved in the solution so that they will feel compelled to work toward the end goal.

6.) One benefit of including the employee in creating the PIP is what?

- a) It eliminates paperwork
- b) It takes less time
- c) It gives the employee confidence
- d) It gives the manager less to do

When an employee is allowed to be a part of their PIP, it allows them to feel as though they are a part of the problem solution. This helps give the employee confidence to work toward and achieve this defined goal.

7.) It is important to discuss what during an employee's PIP?

- a) The possible schedule changes
- b) Their change in pay rate
- c) The option for the employee to quit
- d) Their past achievements

When discussing a PIP with the employee, employers usually discuss the employee's problems or faults. It is important to also discuss the employee's past achievements and successes in order to boost morale.

8.) Recognizing an employee's achievements allows the manager to do what?

- a) Balance between negative and positive feedback
- b) Focus more on the employee's good side than bad
- c) Downplay the PIP process
- d) Make the employee feel better

By recognizing past problems as well as achievements, the manager is able to balance both negative and positive feedback, which helps the employee not feel as though they are being attacked or belittled.

9.) Just as a refresher, what does PIP stand for?

- a) Personal Interest Project
- b) Performance Improvement Process
- c) **Performance Improvement Plan**
- d) Personal Improvement process

An employee performance improvement plan (or PIP), is a great tool to help employees that are struggling in a specific area.

10.) A performance improvement plan (or PIP), is also known as a _____

- a) Personal Action Plan
- b) **Performance Action Plan**
- c) Performance Action Process
- d) None of the above

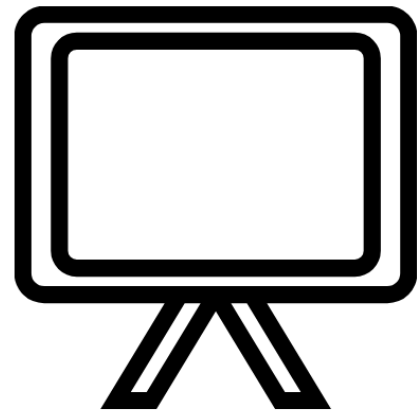
Performance improvement plan (or PIP), also known as a **performance action plan**

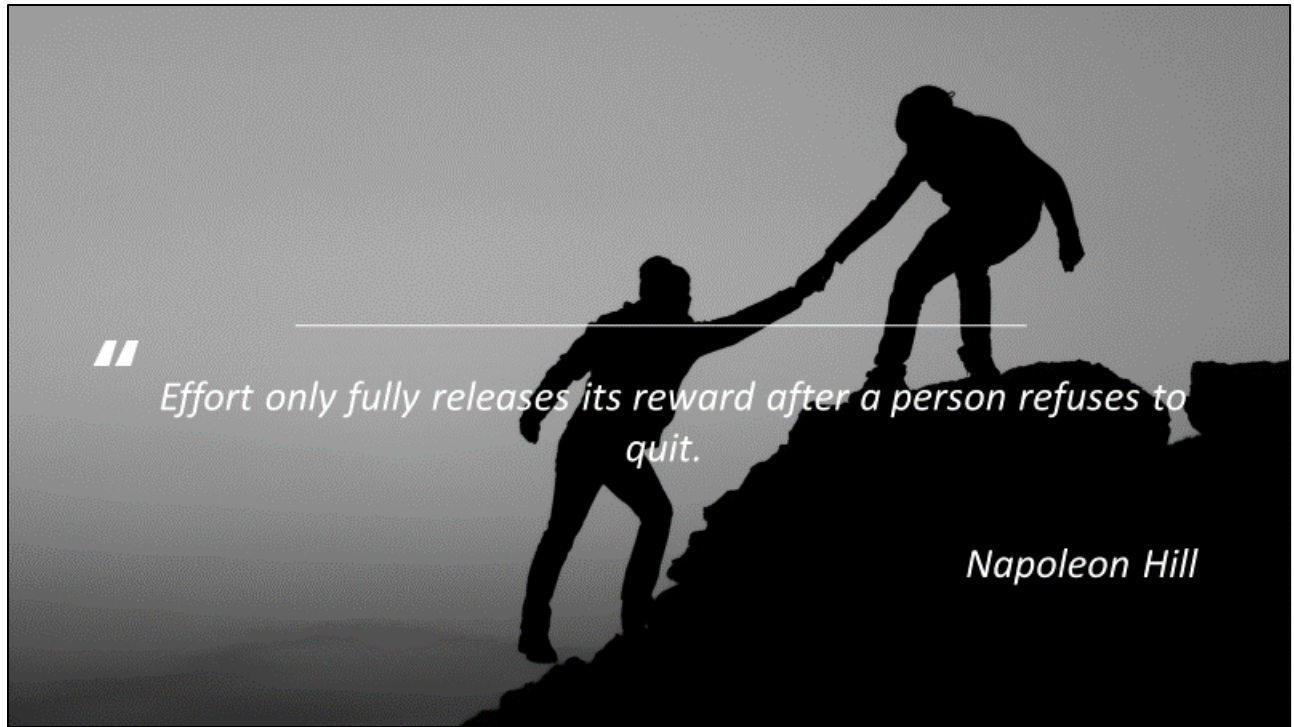
PowerPoint Slides



Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide.

PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.





“

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Napoleon Hill

MODULE TWO

Placing an Employee on a Performance Improvement Plan (PIP) Before Firing

An employee PIP is a tool to help employees struggling with performance; it holds them accountable for their past mistakes.



Justification

The PIP should be specific as to what areas need to change or improve, and should provide an outline to guide the employee.

Validate

Some employees may wonder why they are on a PIP and will need clarification.





Include

The manager should bring out the basic guidelines of a PIP and explain why the PIP is being utilized.

Be Grateful

Managers know that a PIP is best used for creating improvement methods.



Practical Illustration



- Justification
- Validate
- Include
- Be Grateful

Module Two: Review Questions

1. What is the first step in a Performance Improvement Plan?

A. Notifying human resources

B. Asking the employee for a solution

C. Establishing the purpose

D. Chastising the employee

Quick Reference Sheets



Below is an example of our Quick Reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date. They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.



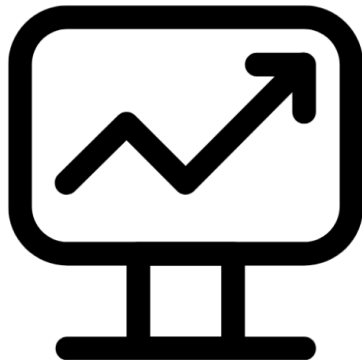
Employee Termination Processes

Quick Reference Sheet



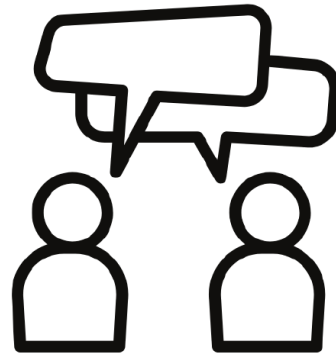
Justification

The first step to creating an effective **Performance Improvement Plan (PIP)** is to establish why the PIP is being implemented and what the employee should gain from it. Typically, PIPs are put in place when it is shown that an employee is performing poorly and will need some form of improvement before moving forward with other forms of discipline. The PIP should be specific as to what areas need to change or improve and should create some sort of outline for the employee. The manager should discuss with the employee why their performance needs to change and what will happen if it does not. Outline the path of consequences that can occur if there is not improvement, including termination.



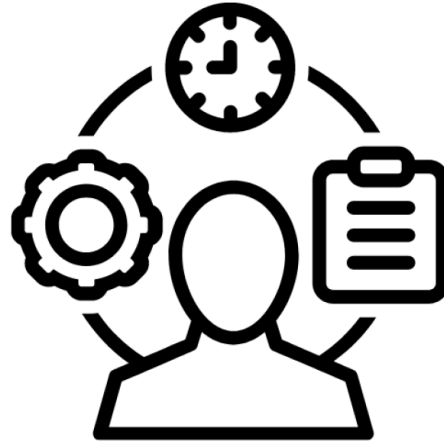
Validate

After the PIP has been fully explained and the benefits as well as consequences have been defined, the manager should ensure that the employee understands why they are being placed on the PIP and if they know what is expected of them. Once the employee has been notified of their placement on a PIP, the manager should ask the employee if they have any initial questions or have any feedback, they'd like to offer up front. Some employees may wonder why they are on a PIP for certain behaviors and will need clarification on what actions are not working for them and what areas of behavior will need to change. The manager should always obtain some form of confirmation that the employee understands why the PIP is necessary and why they will need to participate.



Include

The manager should bring out the basic guidelines of a PIP and should explain to the employee why the PIP is being utilized for them. While some actions are created by the manager for the employee to follow, it is important that the manager include the employee in ways of creating solutions to the problem at hand. Ask the employee how they think the problem can be resolved and how they perceive putting their plan into action. If the employee is unsure how to handle the situation or how to improve their problem, offer feedback and advice, but don't answer the problem for the employee. Allowing the employee to take place in their own PIP and define ways they are capable of improving themselves allows them to have a greater stake in the plan and will feel more confident about undertaking the massive changes outlined for them.



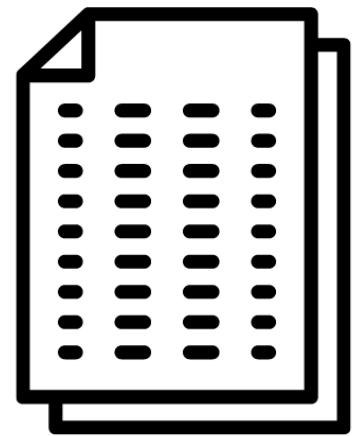
Handouts



Each course is provided with a wide range of worksheets.

Worksheets help check your participants' understanding. If a lesson calls for a worksheet, it will be listed in the Lesson Plan box under Materials Required. All worksheets are customizable and can be found in the Appendix of the Instructor Guide and the Training Manual.

As a trainer, icebreakers give your participants the opportunity to get to know each other better or simply begin the training session on a positive note. Icebreakers promote collaboration, increase engagement, and make your training more light-hearted and fun. Below is an example from the Icebreakers folder.



Sample Worksheet 1

Why Use a PIP?

Use this worksheet to outline some reasons managers could use PIPs for employees.

- _____
- _____
- _____
- _____
- _____
- _____
- _____

NOTES

Sample Worksheet 2

Being Grateful

Use the space below to jot down things you are grateful for in your company. Then write some ideas or ways you can become more grateful for other areas in your everyday life.

Icebreaker Cleaning Up

PURPOSE

In order to make the most of this workshop, students should come in with a fresh mind. This activity will help participants clear their heads and it will give them a stress management tool that they can use in the future.

MATERIALS REQUIRED

- Plenty of scrap paper, stacked in the middle of each table
- Pens or pencils
- Small basket, also placed in the middle of the table
- Small prizes, if desired

ACTIVITY

Explain to participants that this activity is completely confidential: no one will see the results of the activity.

Ask participants to take a stack of scrap paper. On each sheet, they are to write one thing that is on their mind (positive or negative). Once they have written down the item, they can scrunch up the piece of paper and toss it in the basket. If you like, you can give participants a small prize for each item that they get rid of.

Explain that since stress is individual, some people will have many items and some will only have a few. That's OK! However, encourage participants to write down at least one item.

DEBRIEF

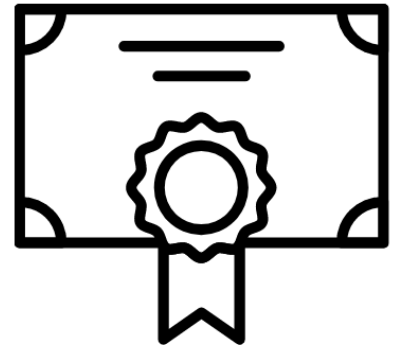
After about five minutes, discuss the activity.

- How did the activity feel at the beginning? (Some people find the activity embarrassing or silly at the beginning.)
- How did you feel by the end? (Some participants, particularly tactile learners, find this activity immensely stress-relieving.)
- How could you use this technique to manage stress in your life? (Encourage participants to try this activity the next time are having a hard time concentrating, or if they feel overwhelmed.)
- Are we ready to start learning?

Certificate of Completion



Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.



CERTIFICATE OF COMPLETION

[Name]

Has mastered the course
Employee Termination Processes

Awarded this _____ day of _____, 20____

Presenter Name and Title
