PROCESS A PERFORMANCE IMPROVEMENT PLAN (PIP)
FOR: CAREER MANAGERS & HR

OVERVIEW
A PIP should be initiated by a Career Manager when, despite verbal and written feedback, an employee is not meeting the firm’s performance management expectations to the extent necessary to be effective in their role, based on their goals and the Firmwide Behaviors and Performance Expectations for their level and Job Family or Job Family Group. The PIP documents discussions regarding current performance deficiencies and expectations going forward. It is intended to help the employee address deficiencies identified and bring performance to an acceptable level.

TOPICS COVERED
- Initiate a PIP
- Conduct 45 day Check In
- Conduct 90 day Check In
- Conduct Six Month Check-In
- Identify HR Talent Consultant in Workday

PIP PROCESS OVERVIEW

Prepare
- Reach to your HRTC to discuss next steps to further document performance concerns
- Draft the PIP document in Workday
- Cite specific examples of the noted deficiencies and concrete, attainable development actions
- Don’t use direct quotes, speculation or “hear-say”

Deliver
- Lead the PIP delivery discussion
- Own the conversation and ensure the feedback is delivered in an appropriate, constructive but clear and concise manner
- An HRTC will be in the meeting to answer any questions and support the dialog

Engage
- Make yourself available to the staff member and support them throughout the PIP process
- Continue to collect feedback from the Job Leader, client, etc.
- Check ins with the employee should be on a bi-weekly basis at minimum to discuss progress against actions

Follow up
- Continue to engage with the HRTC on the employee’s progress
- Complete the 45/90-day check in form in Workday
- Meet with employee to discuss 45- and 90-day check in progress

Next Steps
- Make a determination on the performance improvement with input from your HRTC
- If Employee shows appropriate progress and improvement in areas of concern -- follow up with 6-month pulse check in Workday
- If performance does not improve after an appropriate period of time, discuss appropriate next steps with the HRTC, which may include termination of employment
INITIATE A PIP

NEED TO KNOW:
- A Career Manager must be an Associate, Lead Engineer/Technologist/Scientist/Technical Specialist or above to initiate a PIP
- Conversations should occur between the Career Manager, the Job Leader, HR and the appropriate senior leader before initiating this process
- HR will be the approver

WORKDAY STEPS
1. In the Search field, type “Start Performance Improvement Plan for Employee”
2. Select the Employee for whom you are issuing a PIP
3. Select Performance Improvement Plan in the Review Template field
4. Enter today’s date in Period Start Date field
5. Enter today’s date in Period End Date field
   Note: The Period Start Date and Period End Date do not drive the check-in dates. The 45 day, 90 day and 6 month check-ins are triggered off of the date the manager meets to debrief the employee.
6. Click Submit
   Result: A page with the text: Start Performance Improvement Plan Confirmation displays. Also a Manager Evaluation: Performance Improvement Plan task is added to your Workday Inbox.
7. Click Open
   Result:
   - A Complete Manager Evaluation form opens
   - BAH-Need help with a PIP? Box displays with tips to assist with the PIP.
     Click the x to close the box
8. Click Go to Guided Editor – Do not click on Go to Summary Editor
9. Read the Introduction carefully
10. Click Next
11. Read the instructions on the PIP Code page

12. Click the Pencil icon enter the appropriate primary and secondary PIP Codes
13. Click Next
14. On the Performance Improvement Plan page, click the Pencil icon to enter text in the Answer fields for each of the items
   Note: Click the Bar Graph icon at the top right of each page to view examples of appropriate performance-related text to enter. Continue to click the Pencil icons to enter your responses to each of the items on the form.
15. Click Next
16. Review the Summary
17. Click Submit
   Result:
   - HR will receive a Workday Inbox Action to review the PIP
   - Once approved by HR, the Career Manager receives a To Do step in their Workday Inbox to meet with the employee to review the PIP. You will want to ensure that HR attends the meeting. If the Career Manager is not a Sr. Associate or above, Sr. Leadership should be included in the meeting.
18. Return to the To Do item in your Workday Inbox after meeting with the employee
19. Click Submit
   Result:
   - The employee will receive a Workday inbox action to acknowledge the PIP
WHAT HAPPENS NEXT:
- 45 days from the date the Career Manager debriefs the employee they will receive a notification to complete the 45-day check-in
- 90 days from the date the Career Manager debriefs the employee they will receive a notification to complete the 90-day check-in
- 6 months from the date the Career Manager debriefs the employee they will receive a notification to complete the 6-month check-in

CONDUCT 45 DAY CHECK-IN

WORKDAY STEP
The Career Manager will receive a notification with a link to complete the 45-day check-in:
1. Complete all required fields (marked with a red asterisk)
2. Select the employee for whom you are completing the 45-day PIP check-in
3. Select Post PIP Check-In, then 45-day PIP Check-In in the Review Template field
4. Enter today's date in Period Start Date field
5. Enter today's date in Period End Date field
   Note: The Period Start Date and Period End Date do not drive the check-in dates. The 45-day, 90-day and 6-month check-ins are triggered off of the date the manager meets to debrief the employee.
6. Click Submit

Result:
- A page with the text: Start Performance Improvement Plan Confirmation displays. Also a Manager Evaluation: 45-day PIP Check-In task is added to your Workday Inbox
7. Click Open
   Result:
   - A Complete Manager Evaluation form opens
   - BAH-Need help with a PIP? Box displays with tips to assist with the PIP. Click the x to close the box
8. Click Go to Guided Editor
9. Follow the instructions to complete Steps 1 and 2 to add Ratings and comments regarding the employee's progress.
10. Click Next
11. Click Submit

WHAT HAPPENS NEXT:
- HR will receive the updated PIP in their Workday Inbox to approve or send back
- Once approved by HR, the Career Manager receives a To Do step in their Workday Inbox to meet with the employee to review the PIP. If needed, you can request HR attend the meeting. If the Career Manager is not a Sr. Associate or above, Sr. Leadership should be included in the meeting

CONDUCT 90 DAY CHECK-IN

WORKDAY STEP
The Career Manager will receive a notification with a link to complete the 90-day check-in:
1. Complete all required fields (marked with a red asterisk)
2. Select the employee for whom you are completing the 90-day PIP check-in
3. Select Post PIP Check-In, then 90-day PIP Check-In in the Review Template field
4. Enter today's date in Period Start Date field
5. Enter today's date in Period End Date field

Result:
- A page with the text: Start Performance Improvement Plan Confirmation displays. Also a Manager Evaluation: 90-day PIP Check-In task is added to your Workday Inbox.
7. Click Open
   Result:
   - A Complete Manager Evaluation form opens

Note: The Period Start Date and Period End Date do not drive the check-in dates. The 45-day, 90-day and 6-month check-ins are triggered off of the date the manager meets to debrief the employee.
• A Complete Manager Evaluation form opens
• BAH-Need help with a PIP? Box displays with tips to assist with the PIP.
  Click the x to close the box
8. Click Go to Guided Editor

9. Follow the instructions to complete Steps 1 and 2 to add Ratings and comments regarding the employee’s progress.
10. Click Next
11. Click Submit

WHAT HAPPENS NEXT:
• HR will receive the updated PIP in their Workday Inbox to approve or send back
• Once approved by HR, the Career Manager receives a To Do step in their Workday Inbox to meet with the employee to review the PIP. If needed, you can request that HR attends the meeting. If the Career Manager is not a Sr. Associate or above, Sr. Leadership should be included in the meeting

CONDUCT SIX MONTH POST PIP CHECK-IN

WORKDAY STEPS
The Career Manager will receive a notification with a link to complete the 6-month check-in:
1. Complete all required fields (marked with a red asterisk)
2. Select the employee for whom you are completing the 6-month PIP check-in
3. Select Post PIP Check-In, then 6 Month Post PIP Check-in in the Review Template field
4. Enter todays date in Period Start Date field
5. Enter todays date in Period End Date field
   Note: The Period Start Date and Period End Date do not drive the check-in dates. The 45-day, 90-day and 6-month check-ins are triggered off of the date the manager meets to debrief the employee.
6. Click Submit
   Result:
   • A page with the text: Start Performance Improvement Plan Confirmation displays. Also, a Manager Evaluation: 6-month PIP Check-In task is added to your Workday Inbox
7. Click Open
   Result:
   • A Complete Manager Evaluation form opens
   • BAH-Need help with a PIP? Box displays with tips to assist with the PIP.
   Click the x to close the box
8. Click go to Guided Editor
9. Enter Comments on Progress summarizing the employee’s impact against goals as well as their strengths and growth areas
   Note: Feedback provided in this section is a culmination of 360-degree feedback collected and provided to the employee since the initial issuance of the PIP.
10. Click Submit

WHAT HAPPENS NEXT:
• HR will receive the updated PIP in their Workday Inbox to approve or send back
• Once approved by HR, the Career Manager receives a To Do step in their Workday Inbox to meet with the employee to review the PIP. If needed, you can request that HR attends the meeting. If the Career Manager is not a Sr. Associate or above, Sr. Leadership should be included in the meeting