

Owen Patel
Sales Executive
Employer HR file

Date: 14 July 2026
Our Reference: EPIP/19EAB39C
Document Type: Checklist

PIP Outcome Checklist

1. OPERATIONAL CHECKLIST TO END
PERFORMANCE IMPROVEMENT PLAN

Task: Review the final PIP outcomes against agreed SMART objectives.

Owner: Reviewing Manager.

Priority: High.

Due date: 14 July 2026.

Evidence required: Final PIP review notes dated 28 February 2026 verifying consistent CRM logging, renewal wins/retention activity, and use of standardised proposal templates, along with records of training attendance and updated proposal examples.

Status: Pending review confirmation.

Completion notes: Ensure the review accurately reflects satisfactory completion of objectives with recognition of minor ongoing development areas.

Performance Improvement Plan

Area for Improvement	Required Standard	Measurement	Review Date
Not recorded	Not recorded	Not recorded	Not recorded

Any changes to the facts, decisions, actions, evidence, responsibilities or review dates should be agreed in writing and recorded as an amendment to this document.

Follow-up Action Plan

 CHECKLIST DETAILS

Employee
Owen Patel

Role
Sales Executive

Case type
End Performance Improvement Plan

Reference
HRA-19EAB39C

 KEY DATES

Completed
14 July 2026

First review
28 February 2026

 REVIEW CONTROL

Review dates, standards and measurements should remain clear, measurable and recorded in writing.

Action	Owner	Due Date	Evidence Required	Status
Review the pip outcome record and confirm it reflects the agreed facts.	HR	28 February 2026	Completion note or supporting evidence	Open
PIP Outcome Follow-up is due on 30 May 2026.	HR	28 February 2026	Completion note or supporting evidence	Open
Record a clear owner and review point for the performance improvement plan outcome.	HR	28 February 2026	Completion note or supporting evidence	Open
Review the End Performance Improvement Plan record for missing facts, evidence, follow-up ownership or review safeguards before completion.	HR	28 February 2026	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	HR	28 February 2026	Completion note or supporting evidence	Open
File the final documents in the employee's personnel record.	HR	28 February 2026	Completion note or supporting evidence	Open

Continued

PIP Outcome Checklist

2. CONFIRM PIP OUTCOME DECISION AND DOCUMENT

Task: Confirm the PIP outcome to complete this stage.

Owner: Reviewing Manager and HR Advisor.

Priority: High.

Due date: 14 July 2026.

Evidence required: Decision documentation confirming outcome as 'Complete this stage' with reference to 28 February 2026 review.

Status: Pending employer finalisation.

Completion notes: Verify facts and outcome before document finalisation and filing.

3. SCHEDULE AND PREPARE FOR FOLLOW-UP REVIEW

Task: Arrange follow-up performance review meeting.

Owner: Reviewing Manager.

Priority: Medium.

Due date: 30 May 2026.

Evidence required: Calendar invitation or meeting notice for follow-up review.

Status: Overdue.

Completion notes: Prompt scheduling and preparation for 30 May 2026 follow-up are necessary to maintain performance management continuity.

Continued

PIP Outcome Checklist

4. VERIFY SUPPORTING EVIDENCE AND DOCUMENTATION

Task: Collect and review all supporting evidence relevant to the PIP outcomes.

Owner: HR Advisor.

Priority: High.

Due date: 14 July 2026.

Evidence required: Review attached documents or notes related to training attendance, proposal updates and CRM logging compliance.

Status: Evidence documents pending review; employer to validate completeness and relevance.

Completion notes: Ensure all evidence is consistent with review findings prior to record completion.

5. INTERNAL REVIEW FOR COMPLIANCE AND ACCURACY

Task: Conduct internal verification of process compliance and accuracy of facts, dates, and communications.

Owner: HR Manager.

Priority: High.

Due date: 14 July 2026.

Evidence required: Checklist of compliance points reviewed including legal risk assessment and policy adherence.

Status: Not started.

Completion notes: Confirm all mandatory safeguards are met and review recommended next steps prior to closure.

Continued
PIP Outcome Checklist

6. FILE COMPLETED DOCUMENTS IN EMPLOYEE PERSONNEL RECORD

Task: Archive final PIP outcome documents appropriately within the employee’s personnel file.

Owner: HR Administrator.

Priority: High.

Due date: 14 July 2026.

Evidence required: Confirmation of document filing, electronic or physical copy reference.

Status: Pending document finalisation and employer review.

Completion notes: Maintain confidentiality and ensure ease of future access by authorised personnel.

7. AMENDMENT CONTROL

Any changes to the facts, decisions, actions, evidence, responsibilities or review dates should be agreed in writing and recorded as an amendment to this document.

Appendix A - Amendment Log

Amendment Date	Section Updated	Previous Position	Updated Position	Approved By