

Owen Patel
Sales Executive
Employer HR file

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

PIP Outcome Record

1. EXECUTIVE SUMMARY

This document summarises the outcome of the Performance Improvement Plan (PIP) for Owen Patel, Sales Executive, following the final review held on 28 February 2026.

The review assessed Owen's progress against the three agreed SMART objectives focusing on CRM logging consistency, renewal wins/retention activity, and use of standardised proposal templates.

The manager judged that Owen satisfactorily met the objectives with minor areas identified for ongoing development.

The PIP stage has been completed, and a follow-up review is scheduled for 30 May 2026 to monitor sustained performance and support further development.

HR RECORD 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.

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2. CASE SUMMARY

Owen Patel, Sales Executive at HRHeaven QA Sample Employer, was placed on a Performance Improvement Plan to address specific performance objectives.

The plan aimed to enhance consistency in CRM system usage, increase renewal wins and retention activities, and standardise proposal documentation practices.

The final review on 28 February 2026 evaluated these areas to determine whether the objectives had been satisfactorily met to conclude this stage of the PIP.

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

Action	Owner	Due Date	Evidence Required	Status
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
Assign an owner for each follow-up action and diarise the next review date.	HR	28 February 2026	Completion note or supporting evidence	Open

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3. BACKGROUND

The Performance Improvement Plan was initiated to support Owen in meeting defined performance standards linked to his sales role.

The plan included three SMART objectives:

- Consistent and comprehensive logging in the CRM system.
- Achieving at least two renewal wins through retention activities.
- Utilising the standard proposal templates for client communications.

Training sessions on CRM use and proposal template applications were provided to Owen to underpin these goals.

Periodic reviews monitored progress, with the final assessment conducted on 28 February 2026.

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4. INFORMATION CONSIDERED

The final PIP review encompassed an assessment of Owen's performance against the agreed SMART objectives.

Evidence reviewed included:

- Quality and consistency of CRM logging, including adherence to required completeness and timeliness standards.
- Recorded renewal wins and engagement in retention activities, with at least two successful instances expected.
- Usage of standardised proposal templates supported by submitted examples of updated proposals.
- Attendance records from related training sessions were also considered.

Owen's line manager provided a professional judgement on the satisfactory achievement of these objectives, noting minor areas for ongoing development.

5. DECISION

Based on the evidence and manager assessment, it was determined that Owen has satisfactorily met the three SMART objectives of the Performance Improvement Plan.

Consequently, this stage of the PIP is now complete.

The completion date for this outcome record is 14 July 2026.

A follow-up review has been scheduled for 30 May 2026 to ensure sustained performance and to provide further support if required.

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6. REASONS

Owen's consistent application of CRM logging practices improved operational data integrity, contributing to sales tracking and forecasting.

Achieving the renewal wins target demonstrated capability in client retention and revenue maintenance, vital for the role.

His use of standardised proposal templates enhanced efficiency and maintained professional consistency in client communications.

While the objectives were met satisfactorily, minor areas identified for ongoing development will be addressed in regular performance management processes outside the PIP framework.

7. FOLLOW-UP ACTIONS

A follow-up review is set for 30 May 2026 to monitor continued performance and any additional development needs.

The line manager will own this review and ensure it is diarised accordingly.

Owen will continue to receive routine performance support in line with organisational expectations.

No immediate further action regarding performance concerns is planned beyond standard management oversight.

The organisation should verify any supporting evidence used in the review before final filing to maintain procedural integrity and compliance.

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8. **AUDIT INFORMATION**

Document Reference: HRA-19EAB39C

Date of Final Review: 28 February 2026

Date of Outcome Record Completion: 14 July 2026

Next Follow-up Review Date: 30 May 2026

Document prepared for HRHeaven QA Sample Employer's personnel records and reviewing managers.

All factual details reflect employer-supplied information as at the specified dates.

This document does not contain legal or medical conclusions and should be reviewed by relevant parties to ensure compliance with company policies and UK employment law.

Employer responsibility remains for final verification and formal sign-off prior to issuance or filing.

9. **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