

Owen Patel

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

Dear Owen,

This letter summarises the outcome of your recent Performance Improvement Plan (PIP) review and outlines the next steps agreed upon by your manager.

Our aim is to support your continued development as a Sales Executive and ensure clarity on performance expectations moving forward.

As discussed during the review meeting held on 28 February 2026, your PIP focussed on three specific SMART objectives: maintaining consistent and accurate logging of contacts and activities in the CRM system; achieving at least two renewal wins or equivalent retention-related sales activities; and using the standardised proposal templates in preparing customer offers.

In addition, your training attendance and examples of your updated sales proposals were examined to assess progress against these goals.

Your manager assessed that you have met these objectives to a satisfactory standard. Minor areas for ongoing improvement were highlighted but were not deemed to require further formal review under the PIP process at this stage.

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



LETTER 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
Review the pip outcome checklist 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

Following thorough evaluation, your manager has concluded that this stage of your PIP is complete, reflecting satisfactory performance against the agreed criteria.

Although some minor development points remain, these are to be managed through regular coaching and support within your day-to-day role.

You should view this completion as a positive step acknowledging your efforts and achievements during the programme.

To ensure sustained progress, a follow-up review has been scheduled for 30 May 2026.

Between now and that date, please continue to apply the skills and standards discussed in your role, seeking guidance from your manager as needed.

Your manager will remain available to support your ongoing development and address any concerns.

We recommend you reflect on the feedback provided and identify any specific areas where you would appreciate additional support or resources.

Further formal PIP measures will only be reconsidered if significant concerns arise prior to the follow-up review.

Yours sincerely,

For and on behalf of HRHeaven QA Sample Employer