

## PROCESS A PERFORMANCE IMPROVEMENT PLAN (PIP)

FOR: CAREER MANAGERS & HR

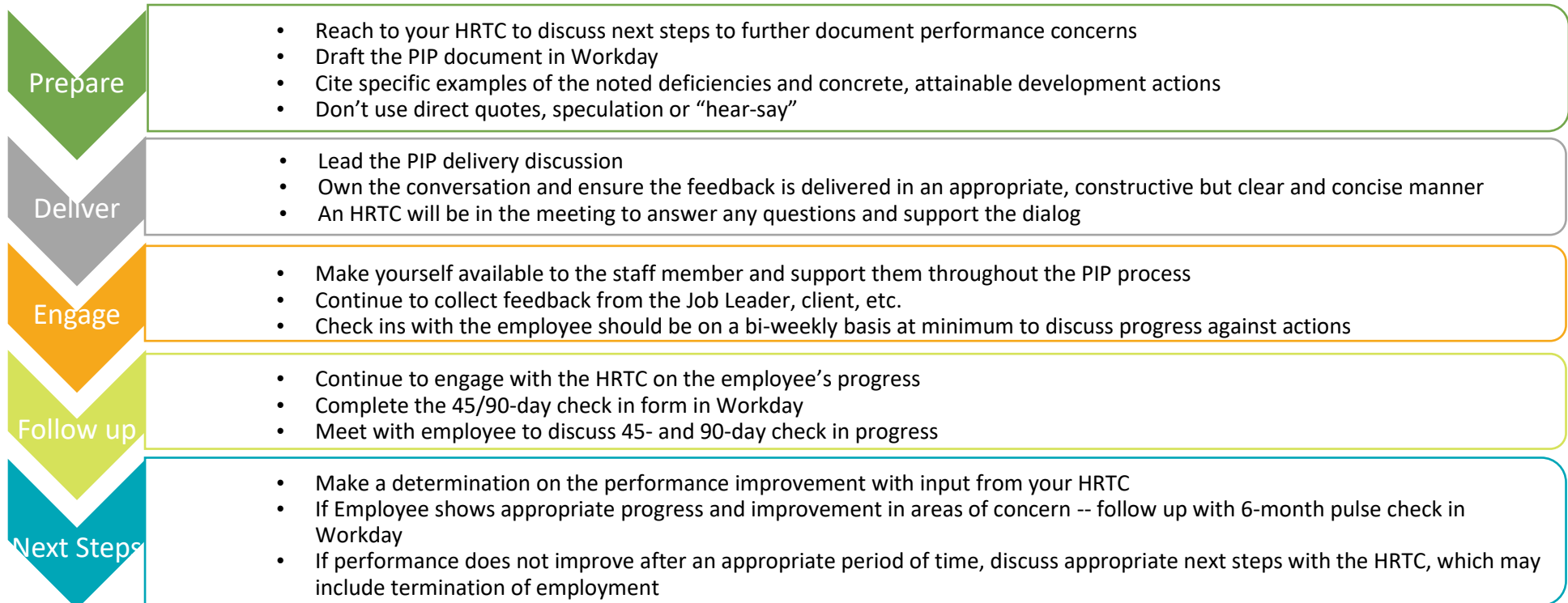
### TOPICS COVERED

- [Initiate a PIP](#)
- [Conduct 45-day Check In](#)
- [Conduct 90-day Check In](#)
- [Conduct Six-Month Check-In](#)
- [Identify HR Talent Consultant in Workday](#)

### 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.

### PIP PROCESS OVERVIEW



## 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. If the employee is a Job Leader and/or Career Manager (JL/CM), those discussions should include whether the behaviors leading to the PIP may have an impact on the employee's ability to continue in their role as a JL/CM.
- 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**, attesting that the appropriate conversations have occurred between the Career Manager, Job Leader, and appropriate senior leader about the PIP.

#### **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  
**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: 90-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 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 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: 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