

# How to Document a Discussion

- x Summarize what was said during the meeting
- x Describe the expectations- clearly state what the policy/procedure requires
- x Describe the behavior or performance that must change and that which should continue
  - o Remember to describe the conduct, not the employee
- x Include the employee's explanation why the expectations are not being met
- x Include the detailed action plan which specific deadlines

## **Tip**

- x Set specific deadlines
- x Avoid vague, unclear statements about what the employees needs to do to improve
- x Avoid absolutes like "always," "never"
- x Include positive comments
- x Prepare the documentation as though a third party will read it

To: Employee  
From: Manager  
Date: 2/1/2021  
Re: Follow up to 1:1

Dear (Employee Name),

This email is to document our conversation today, regarding (describe the performance/ behavior issue). During the meeting we spoke about \_\_\_\_\_. During our discussion you brought up that the reason for the issue was because \_\_\_\_\_.

As we discussed, the performance/behavior issue is not in line with list University/department policy/ management expectation here. It is the expectation that moving forward you will \_\_\_\_\_ by deadline date.

To assist you through this process, here are some resources/guidelines that you can utilize. I will schedule a follow up meeting for date to review progress on this issue.