

Part of the BusinessCPR™ Management System, Step 5—Be Accountable for *Your* Results

When the decision has been made to take an employee through your published progressive discipline process, you protect yourself and serve your employees best by documenting facts that have driven the decision to take progressive discipline action.

The following is noted in the BusinessCPR™ Progressive Discipline Policy:

Before the Meeting. Arrange to meet with the employee privately. The discipline of an employee is not to be done in public or in front of other workers. Meeting preparation includes reviewing notes and files about the specific incident or problem in question and any past discipline taken, either verbal or written.

The BusinessCPR™ Employee Administrative Action Report is a management tool designed to help organize the facts driving the need for progressive discipline and to help you lay out the key talking points you plan to use in the progressive discipline conversation. Use of the BusinessCPR™ Progressive Discipline Form is to help you record the key points raised during progressive discipline conversation. The employee administrative action report is used to help you lay out the context for having progressive discipline conversation.

Again, the goal of a progressive discipline process is to position management to deal fairly and decisively with employees who fail to meet minimum performance standards. Progressive discipline is the third component of your Contributions Management Process or CMP. It aims to either help those struggling to contribute to business results earn the money you are paying them or move them out reasonably and decisively from your employ. The following tool helps you prepare for doing this.

### **We are here to help ...**

Should you have questions about implementing the BusinessCPR™ Progressive Discipline Process or in using this form, email [help@business-cpr.com](mailto:help@business-cpr.com) to schedule a time to speak with one of our BusinessCPR™ Certified Business Coaches to get your questions answered.



## EMPLOYEE ADMINISTRATIVE ACTION REPORT

Employee:		Incident Date:	
Author:		Report Date:	
Supervisor:		Review Date:	
Office:		File Date:	

**Type of Employee Discussion: (Check “√”all that apply)**

- Accident  
  Incident  
  Verbal Warning  
  2<sup>nd</sup> Warning  
  3<sup>rd</sup> Warning  
  Final Warning  
 Raise  
  Promotion  
 Demotion  
  Termination  
 Hire  
 Other

**1. WHAT happened:** (I.e., accident occurred, altercation, client commendation, client criticism, fight, unusually good/bad performance, general discussion with an employee about their overall contribution, attendance, attitude, quality of work)

**2. WHO was present?** (Witness statements, Police report, Work Reports, Daily Field Reports, etc.)

**3. Where and When did this occur?** (Location + time; if appropriate draw a map, label people, cars, equip etc.)

**4. Why do you think this occurred?** (Failure to follow instructions and procedures, Untrained, Rushing)

**5. Employee Discussion:** (What will be discussed with the employee – be clear on behaviors and results that need to change.)

**6. Employee’s Response** \_\_\_ Accept \_\_\_ Reject (Check one. Include their comments and commitments.)

\_\_\_\_\_  
Supervisor Signature

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Office Manager