

# Counseling Record

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Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_

Department: \_\_\_\_\_ Issuing Manager's Name: \_\_\_\_\_

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**Purpose:** To provide a formal opportunity for a supervisor to help an employee understand where improved performance is expected, and to provide a written record of each counseling session:

- ☐ Written Warning
- ☐ Final Written Warning
- ☐ Other

*The company has absolute discretion to determine the appropriate corrective action depending on the facts and circumstances.*

**Problem Definition:** List below specific reason(s) why this person is being counseled and the impact the problem has on the company.

**Prior Warnings:** (verbal or written) occurred on the following date(s) and involved the following facts and circumstances:

**Improvement Required:** List below specific actions the employee must take to correct the situation or behavior.

**Suggested Means of Improvement:** List below specific goals, objectives and measurement standards that you and the employee have agreed to, and in what time frame.

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Failure to comply with the above within the specified period, or further violations of company policies and procedures will result in further disciplinary action up to and including termination.

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Manager Signature

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Date

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Witness Signature

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Date

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**Should the employee disagree with any of the information contained in this counseling record the employee may submit a written statement explaining his or her position below (attach additional pages as necessary).**

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Employee Signature

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Date

# Extension 1

## Problem Definition:

Michael has communicated (verbally, and in writing) in a manner, that demeans, belittles, and intimidates other team members into not feeling like they can contribute safely and meaningfully.

This is especially problematic on a team like design where collaboration is critical. When trust and safety are absent, people don't contribute effectively and work is hindered because of it.

Additionally, When presented with questions by his manager, Michael has not responded. This relates to the Slack DM on March 9, in the attachment below titled **"My communication with Michael In a private message"**

## Prior Warnings

- March 2nd & 3rd Michael & I had Zoom meetings discussing Michael's detrimental attitude toward the team.
- 360 Review in October addressed communication, collaboration, and inclusion in various aspects. <https://bit.ly/3l6iXA4>

## Improvement Required

- Improve in tone and patience communicating with teammates—whether written, verbal, or non-verbal.
- Proactively seek to repair damaged relationships with teammates.
- Michael is expected to treat fellow employees with dignity and respect, and to effectively collaborate as a member of a diverse team.
- Using the "Action Plan" laid out in CultureAmp, complete the "Who are you 'being' in your conversations?" section and submit it in writing to Shane
- Review the "Communications" & "Collaboration" sections from the Designer levels document: <https://www.notion.so/planningcenter/Designer-Levels-96079d3955d1496582361fc753cebabe> as a resource for expected behavior of a Level 5 Designer
- Michael will work toward repairing broken relationships with his immediate team (and other parties determined by manager) by using this method <https://www.goodtherapy.org/blog/how-to-repair-a-relationship-in-5-steps-0717194> or another method approved by manager.

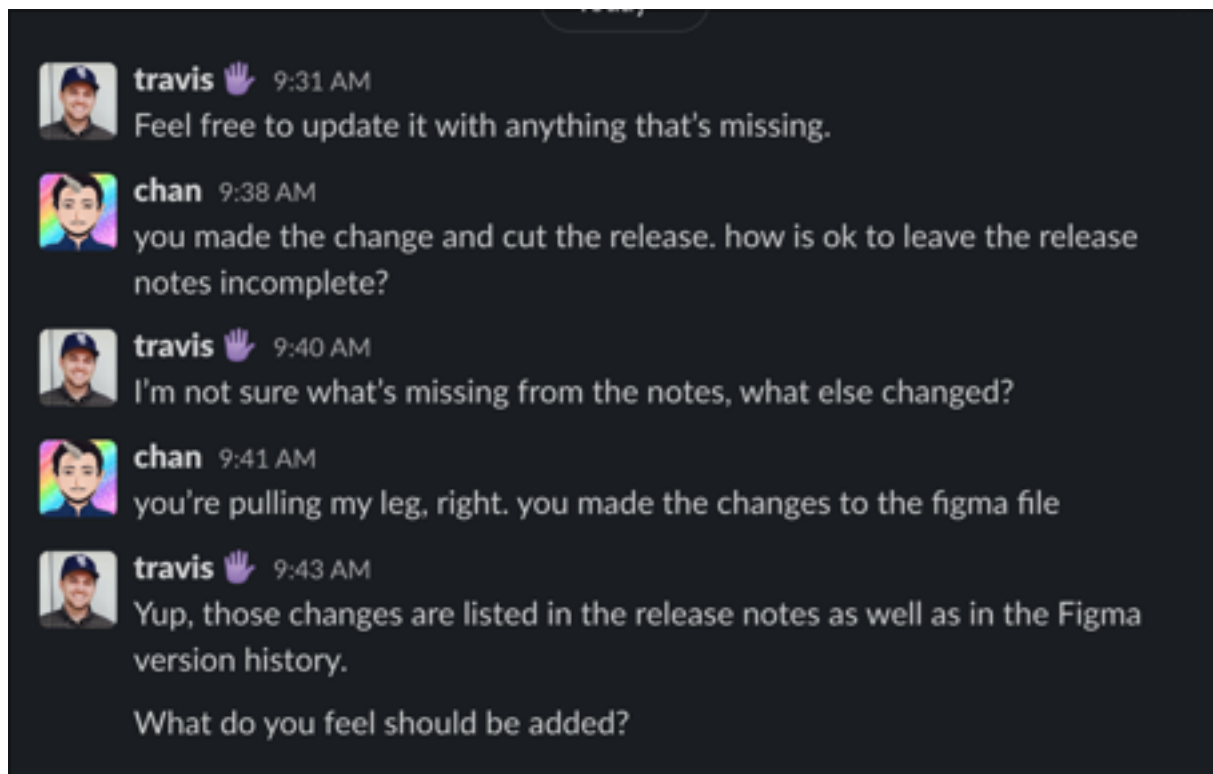
- Michael will respond in a timely manner when his manager asks questions via Slack. \*  
timely manner is to mean within 2 hours during office hours.

## Attachment 1

### Slack:

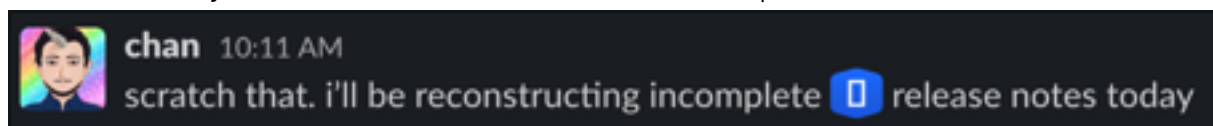
March 9, 2021

#### From the -#dx Slack channel



#### Related in the -#utility Slack channel

In the utility team channel Michael noted that he'd not be doing what his original plans were for the day since he now had to "reconstruct incomplete release notes"



Subsequent to this post, Michael did redact the message in Slack.

#### My communication with Michael In a private message

Yesterday ▾



**chan** 🙄 9:44 AM

i literally don't even know what to do in DX right now. this guy's gaslighting me crazy hard



**shane** 🇲🇻 10:01 AM

Sorry I haven't followed the work super-closely. I genuinely don't know what part of the release notes is incomplete.

Happy to jump in and point it out if that helps? (edited)



**chan** 🙄 10:10 AM

nevermind. i'll just do it



**shane** 🇲🇻 10:28 AM

Sounds frustrating.

If I could give some feedback, the annoyance and frustration comes across pretty hard in Slack.

Would you be willing to work on softening your communication a bit for the sake of the team?



**shane** 🇲🇻 10:44 AM

Also, please know that I'm here if you need to vent about anything. I appreciate your rigorous work, but more importantly you as a person.



**shane** 🇲🇻 4:12 PM

How'd everything go with the release note patch-up?



**chan** 🙄 5:17 PM

it's done