

Performance Improvement Plan Policy- Morfdesk

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1 Purpose

The Performance Improvement Plan (PIP) is used to address performance problems that are identified for employees. PIP captures opportunity areas which can be worked through by the employee to achieve an improved level of performance with the support of the manager and other stakeholders. The employee will have to take the necessary steps and actions to meet performance expectations.

The objective of the policy is to:

- a) Identify employees who don't meet the expected performance levels.
- b) Ensure employees are given a fair opportunity and necessary support to improve their performance.
- c) Ensure that the PIP process is followed without any bias and prejudice.

2 Authority and Approval

Management reserves the right to revise, amend or modify this policy at any time and in any manner without notice. Any change or revision will be available with the Organization Development Team and communicated appropriately.

3 Effective Date

The Performance Improvement Plan policy is effective from 1st January 2024.

4 Scope

1. All employees on rolls of Morfdesk. Retainers and third-party contractors are not in scope.
2. Employees stratified as Below Expectations (BE) in the performance review cycle.
3. Others - Employees identified as low performers through manager feedback, consistent low performance, or sudden dip in performance.

5 Policy

5.1 Guidelines

Below listed are the policy standards:

- a) PIP duration: Minimum of 1 month and maximum of 3 months.
- b) PIP cannot be initiated for long leave or maternity leave cases.

- c) Post successful completion of PIP, employees should ensure that they maintain the same performance level as that during the PIP. In case the employee fails to maintain the same, then the company may initiate appropriate action as it deems fit.

5.2 Performance Improvement Plan Process

5.2.1 Identification

- a) Employees stratified as "Below Expectations" are identified post the performance review cycle.
- b) Others -Employees are identified as low performers through manager feedback, consistent low performance, or sudden dip in performance.
- c) People Partners need to review the quality of PIP generated by managers.

5.2.2 Discussion with Employee

There should be a formal discussion with the employee before the initiation of the performance improvement plan. The discussion should be driven by the project manager from the business and should involve People Partners only if required.

The discussion should address the following:

- a) Share the gaps in performance and areas of opportunity as observed by the manager.
- b) State-specific events/ circumstances that led to the employee being identified as a low performer and hence the need to go on a PIP.
- c) Seek the employee's view on the data shared by providing an opportunity to explain their opinion/ comments on the matter.
- d) Discuss and agree on the measurable goals, tasks/ activities to be completed/ achieved by the employee during the PIP period.
- e) Convey the timeline by which each goal, task/ activity needs to be completed.
- f) Agree on the timely review and milestones to be met during the PIP period.

5.2.3 PIP Formalization on the system

The PIP form for identified employees needs to be initiated in the system by the People Partner with the Start and End date of evaluation. The appraiser and reviewer details will auto-populate, as per the system records.

Once the PIP is created on the system,

- a) The manager should initiate the goals for the employee.
- b) Employees must regularly update their achievements against the set goals.
- c) The manager/ Reviewer should provide feedback & rating for each goal and the final decision on the PIP once the process is concluded.

5.2.4 Progress Monitoring

During the Performance improvement period, the Manager should carefully and constantly monitor the employee's progress on the Performance Improvement Plan. This includes,

- a) Providing required assistance/ resources to perform the stated goals.
- b) Providing training to perform the stated objectives.
- c) Reviewing the employee's performance/conduct regularly.
- d) Providing specific written feedback to the employee concerning any performance problems identified during this period.
- e) Saving work samples, etc. to provide evidence of progress/ further improvement required.

A minimum of one interim review is mandatory. The review dates should be communicated to the employee. The results of each review meeting should be documented and should include a recap of what was discussed in the earlier meetings. Any changes in the plan should be documented and communicated in writing.

5.2.5 Final Evaluation and Decision

- a) The Performance Evaluation would include evaluation in the form of goal-wise qualitative feedback and ratings.
- b) At the end of the PIP period, the appraiser and reviewer should provide the final decision on the system based on the employee's performance/conduct for the said period.
- c) Based on the PIP decision appropriate actions should be initiated by the respective People Partner.

6 Definitions

Term	Definition
PIP	Performance Improvement Plan
BE	Below Expectation
Appraiser	Immediate Reporting Manager/ Manager/ Project Manager
Reviewer	Manager's Manager

7 References

N/A