

## Leading With Clarity

# How to Write Strong Employee Documentation

### **1. Facts (What happened?)**

Describe observable behavior only. Include dates, times, and specifics. Avoid opinions or emotions.

### **2. Policy (What rule applies?)**

Reference the company policy or expectation that was not met. Keep it clear and relevant.

### **3. Impact (Why it matters)**

Explain how the issue affected operations, team members, or customers.

### **4. Expectation (What must change?)**

State clear, measurable expectations moving forward. Be specific.

### **5. Next Step (What happens if it continues?)**

Clearly outline consequences if expectations are not met.

## Example:

On March 3, the employee arrived 35 minutes late without notice. Company policy requires employees to report to shifts on time. This caused under staffing during peak hours. Employee must arrive on time moving forward and notify management in advance of any delay. Further issues may result in additional disciplinary action.

## Avoid These Mistakes:

- Writing opinions instead of facts
- Being vague or unclear
- Skipping policy references
- Not defining expectations
- Avoiding consequences

Use this simple framework every time:

**Facts → Policy → Impact → Expectation → Next Step**