

Informal Discussion - File Note

i Use this to record an informal chat where you have raised a minor concern before anything becomes formal. It is a management record, not a disciplinary sanction — but a clear note helps if issues continue.

Employee name	[Name]
Job title	[Role]
Manager	[Name]
Date of discussion	[Date]
Location	[Where the conversation took place]

What was discussed

i Describe the concern factually — the behaviour or issue, not the person.

[Set out clearly what you raised and why, with examples and dates where relevant.]

The employee's response

[Summarise what the employee said, including any reasons or context they gave.]

What was agreed

Improvement / change needed	[What needs to be different]
Support offered	[Any help, training or adjustment]
Review / check-in date	[Date]

It was made clear that this is an informal discussion to support improvement. I explained that if the concern is not addressed, it may need to be dealt with under the formal procedure.

Record

Completed by	[Name, job title]
Date	[Date]

i Keep this note confidential and on file. Handling issues informally and early often avoids the need for formal action.