



# Supervisor Documentation Sprint

A 7-day cleanup plan for supervisors who have a real problem employee and no real documentation.

### WHAT THIS HELPS YOU DO

Use this sprint to convert a supervisor's undocumented frustration into a defensible written record in seven days — defining the issue, capturing specific examples, resetting expectations, and building a follow-up trail.

## WHEN TO USE THIS DOCUMENT

- When a supervisor wants to 'document something' but has not identified the real issue
- When termination is being discussed and the file is empty
- After HR discovers a long-running problem that lives only in the supervisor's memory
- When a new manager inherits a team with known issues and no records
- Before starting a performance improvement plan

## WHAT THIS DOCUMENT HELPS PREVENT

- Terminations supported by nothing but recollection and adjectives
- Documentation that appears for the first time the week before a firing
- Vague write-ups ('bad attitude') that collapse under scrutiny
- Inconsistent supervisor action across the same team
- PIPs that fail because expectations were never actually reset in writing

*Faulkner HR Solutions focuses on the system behind the people problem. This tool is designed to help employers slow down the decision, identify the risk, and create proof before the issue becomes a claim, complaint, turnover event, or credibility problem.*

## BEFORE YOU START: READINESS CHECKLIST

Gather the following before working through this document. Incomplete inputs are one of the most common reasons employer decisions fail under later scrutiny.

Have it	Input	Notes / location
<input type="checkbox"/>	Employee name and role	
<input type="checkbox"/>	Date of incident, request, or separation	
<input type="checkbox"/>	Supervisor involved	



Have it	Input	Notes / location
<input type="checkbox"/>	Policy or handbook section that applies	
<input type="checkbox"/>	Prior documentation on file	
<input type="checkbox"/>	Pay records, if applicable	
<input type="checkbox"/>	Relevant emails, texts, notes, or complaints	
<input type="checkbox"/>	Decision-maker name	
<input type="checkbox"/>	Deadline, if applicable	



## THE 7-DAY SPRINT

This is a sprint, not a trap. The goal is a fair, specific, written record — and a genuine chance for the employee to correct course. Complete each day's task in order.

### Day 1 — Define the Real Issue

One sentence, behavior-based, no conclusions. 'Misses production deadlines' is an issue. 'Lazy' is an opinion.

<b>Employee name and role</b>	
<b>The issue, stated as observable behavior</b>	
<b>Business impact (missed deadlines, rework, complaints, coverage gaps)</b>	
<b>Policy, standard, or expectation that applies</b>	
<b>How long has this been happening?</b>	

### Day 2 — Capture Specific Examples

List recent, dated, first-hand examples. If you cannot name three, the issue may not be documentable yet — keep observing.

Date	What happened (observable behavior)	Impact	Witness / evidence

### Day 3 — Check the History

Done	History check	Findings
<input type="checkbox"/>	Prior reviews read — do they contradict the issue you just defined?	
<input type="checkbox"/>	Prior coaching or warnings located, with dates	
<input type="checkbox"/>	Consistency checked — are other team members doing the same thing without consequence?	
<input type="checkbox"/>	Any recent complaint, injury, leave, or accommodation request by this employee? (If yes, STOP — complete the Retaliation Risk Map first)	



### Day 4 — Reset Expectations in Writing

Draft the expectation-reset conversation. State the issue, the standard, the support offered, and the follow-up date. Keep it factual and future-focused.

### Day 5 — Hold the Conversation

Done	Conversation step	Notes
<input type="checkbox"/>	Met privately; stated the issue with specific examples	
<input type="checkbox"/>	Stated the expectation and the timeline clearly	
<input type="checkbox"/>	Asked for the employee's perspective and wrote it down	
<input type="checkbox"/>	Offered support (training, tools, check-ins) and recorded what was offered	
<input type="checkbox"/>	Confirmed the follow-up date with the employee	
<input type="checkbox"/>	Documented the conversation the same day	

### Day 6 — Build the Follow-Up Calendar

Check-in date	What will be reviewed	Result (improved / same / worse)

### Day 7 — Proof Checklist

On file	Proof item	Location
<input type="checkbox"/>	Issue definition and examples (Days 1-2)	



On file	Proof item	Location
<input type="checkbox"/>	History and consistency check (Day 3)	
<input type="checkbox"/>	Written expectation reset, acknowledged or noted if refused (Days 4-5)	
<input type="checkbox"/>	Same-day conversation record	
<input type="checkbox"/>	Follow-up calendar with owner and dates	
<input type="checkbox"/>	Copy routed to HR / personnel file	

Role	Name / signature	Date
Supervisor		
HR / reviewer		

### STOP AND REVIEW BEFORE ACTING

If any statement below is true, pause. Get the decision reviewed by HR, counsel, or Faulkner HR Solutions before you act.

- The employee recently complained about pay, harassment, discrimination, safety, leave, or retaliation.
- The supervisor has no prior documentation.
- The decision is inconsistent with how similar cases were handled.
- The employee is on, or recently requested, protected leave.
- The issue involves pay, deductions, final wages, medical information, disability, pregnancy, injury, or protected activity.
- The decision will be visible to a board, council, funder, auditor, plaintiff attorney, or agency.

### MINIMUM DOCUMENTATION STANDARD

Before this file is closed, the employer should be able to answer every question below and point to where the proof lives.

Question	Your answer / where the proof is stored
What happened?	
When did it happen?	
Who observed or reported it?	



Question	Your answer / where the proof is stored
What policy, standard, deadline, or expectation applies?	
What decision was made?	
Who had authority to make the decision?	
What alternatives were considered?	
What risk was reviewed?	
What follow-up is required?	
Where is the proof stored?	

### COMMON MISTAKES

1. Documenting the conclusion instead of the behavior — adjectives are not evidence.
2. Backdating or bulk-writing 'recollections' that are obviously created in one sitting.
3. Skipping the expectation reset and going straight to a write-up the employee has never heard about.
4. Setting a follow-up date and never holding the follow-up.
5. Documenting one employee's lateness while ignoring the rest of the team's.
6. Treating the sprint as termination paperwork instead of a genuine chance to fix performance.

### WHAT TO DO NEXT

At the first follow-up date, record the result honestly. If performance improved, say so in writing — that record protects you too. If it did not, the file now supports the next step: formal warning, PIP, or a termination reviewed through the Termination Risk Review Worksheet.

**Before you terminate, deduct, discipline, classify, or respond, get the decision reviewed.**

Call 210.446.8730 or email [thomas@faulknerhrsolutions.info](mailto:thomas@faulknerhrsolutions.info).



*Before you process payroll, terminate, classify, deduct, or respond to a claim, get the decision reviewed.*

### **Need help applying this to a real workplace decision?**

Faulkner HR Solutions helps Texas employers, nonprofits, municipalities, and growing businesses fix the people systems behind recurring workplace problems.

**If this document raised a risk flag, do not guess your way through the next step.**

**Call: 210.446.8730**

**Email: [thomas@faulknerhrsolutions.info](mailto:thomas@faulknerhrsolutions.info)**

**Website: [faulknerhrsolutions.info](http://faulknerhrsolutions.info)**

#### **DISCLAIMER**

This resource is provided for general employer education and planning purposes. It is not legal advice and does not create an attorney-client relationship. Employment laws, agency guidance, and local requirements may change. Employers should review the facts of each situation before acting and consult appropriate HR or legal counsel when needed.