



Bank & Brews

june workshop

Extraco Formal Coaching Documentation

Name: _____

Date: _____

Manager/Supervisor: _____

Great teams have great coaches, and at Extraco we use frequent coaching to help us all do a better job. You are an important member of our team because _____. Your performance is critical to our success. However, we need you to improve in the following area(s).

Focus of Coaching:

You are receiving this coaching due to lack of schedule adherence, _____,

- Example
- Example
- Example

As a reminder, the Employee Handbook states, the attendance and presence of employees is critical to the function of our organization. Also stated in the Employee Handbook are factors that increase the seriousness of absences:

- Absences that are intermittent (i.e., one or two days on each occurrence).
- Continuing record of poor attendance.
- Other generally unaccepted attendance issues

Impact on others:

- Creates negative customer experience with increased wait times
- Increased work load on coworkers handling extra customer traffic
- More work is created for your direct manager and other managers due to increased need to monitor schedule adherence
- Inability to implement coached behaviors impacts your manager’s ability to support you

Desired outcome:

- Be on time and ready to work according to your schedule
- Communicate early and often if something happens that will affect your schedule
- Plan ahead to avoid any schedule conflicts
- Notify leadership team at least two hours before scheduled, if not able to report to work

Manager’s Signature: _____ Date: _____

Employee’s Signature: _____ Date: _____

Employee Statement (Describe any assistance needed to improve. Use additional sheets if necessary)

Human Resources Signature: _____ Date: _____



Extraco
Banks.

Let’s Build
Some Dreams™



Bank & Brews

june workshop

Extraco Progressive Discipline – Step Two

Name:
Manager/Supervisor:

Date:

This meeting is to advise you of the issues outlined in this document and to serve as a reminder of the standards by which all Extraco employees are required to work. As your manager, I am here to help you succeed and am identifying these behaviors to help you improve your performance. You are an important member of our team because of [redacted] and your performance is critical to our success. However, we need you to improve in the area(s) below.

Reason for Disciplinary Action:

You are receiving this disciplinary action because of your overall performance of operational standards. You have previously received coaching and discipline documents that have addressed your attention to detail. As a result of these issues, you are receiving this document.

NARRATIVE

Outcome or result of these behaviors

- Potential financial loss to Extraco
- Potential loss of credibility with our customers and the community
- Potential loss of credibility with your peers and management team
- Standards are unacceptable per policy
- Created additional work for your manager, your team, and other departments

Desired behavior

- Adhere to Extraco policies and procedures as outlined in the Retail Banking Standards
- Pay close attention to details.
- Adhere to strict professional practices while at work

Manager’s Signature: _____ Date: _____

I have received this disciplinary action and understand that any further incidents within the next 90 days may result in further disciplinary action up to and including termination of my employment.

Employee’s Signature: _____ Date: _____

Employee Statement (Describe any assistance needed to improve. Use additional sheets if necessary)

Human Resources Signature: _____ Date: _____