

COACHING, RETRAINING & FOLLOW-UP PACK

Objective documentation for performance correction, retraining, verification, repeated issues, and action plans

PURPOSE

Use the smallest form that matches the problem. This packet is designed to help managers correct standards fairly without creating duplicate paperwork.

INCLUDED

- ☐ Which Record Should I Use? decision guide
- ☐ Coaching Conversation Log
- ☐ Performance Correction Log
- ☐ Retraining Assignment Log
- ☐ Follow-Up Review
- ☐ Repeated Issue Tracker
- ☐ Manager Action Plan

CONTROL NOTE

Use only the pages that solve a real training need. Protect confidential personnel information, follow company policy and applicable law, and verify readiness from observed performance. Blank forms are for authorized internal use at one restaurant location.

PART 7 - WHICH RECORD SHOULD I USE?

Do not create a stack of forms for one event. Choose the record that matches the management need, then use a follow-up page only when verification is required.

COACHING CONVERSATION LOG

Use when: A clear standard exists and the employee needs feedback or direction.

Primary need: Routine correction or clarification

PERFORMANCE CORRECTION LOG

Use when: A standard was missed, the issue is repeated, or the matter needs a formal operating record.

Primary need: Formal performance correction

RETRAINING ASSIGNMENT LOG

Use when: The employee needs the correct method taught, practiced, and re-observed.

Primary need: Skill or knowledge gap

FOLLOW-UP REVIEW PAGE

Use when: A prior coaching, correction, or retraining action has a due date and must be checked.

Primary need: Verify whether action worked

REPEATED ISSUE TRACKER

Use when: The manager needs to see the pattern, causes, and prior actions in one place.

Primary need: Same issue keeps returning

MANAGER ACTION PLAN

Use when: The correction requires coordinated steps rather than one training event.

Primary need: Several actions, owners, or deadlines

DOCUMENTATION STANDARD

Record observable facts, the exact standard, the employee's response, support offered, the next action, due date, and how completion will be verified. Avoid diagnosing attitude, intent, personality, or motive when the evidence only shows behavior or performance.

EMPLOYMENT / HR BOUNDARY

These tools support operational coaching and training documentation. They do not determine disciplinary level, termination, leave, accommodation, protected activity, or other employment-law decisions. Follow company policy and obtain qualified HR or legal guidance when required.

COACHING CONVERSATION LOG

Employee Name:

Position:

Department:

☐ Front of House

☐ Back of House

☐ Bar

☐ Dish

☐ Management

☐ Other: _____

Manager Name:

Date of Coaching Conversation:

Purpose:

Use this log to document a coaching conversation with an employee.

This form should be used when a manager needs to correct a standard, clarify expectations, address a repeated issue, or guide the employee toward better performance.

Coaching should be clear, fair, and specific.

ISSUE BEING COACHED

What happened?

Date issue occurred:

Observed by:

Standard or expectation missed:

Was this issue connected to:

- ☐ Training
- ☐ Communication
- ☐ Effort
- ☐ Accountability
- ☐ Safety
- ☐ Sanitation
- ☐ Guest service
- ☐ Food quality
- ☐ Attendance
- ☐ Teamwork
- ☐ Other: _____

EMPLOYEE RESPONSE**Employee had opportunity to explain or respond:**

- ☐ Yes
- ☐ No

Employee response:

COACHING GIVEN**Manager explained:**

- ☐ What happened
- ☐ What standard was missed
- ☐ Why the standard matters
- ☐ What needs to improve
- ☐ When improvement is expected
- ☐ What support or retraining is available

Correct expectation moving forward:

FOLLOW-UP PLAN

Follow-up required?

☐ Yes☐ No

Follow-up date: _____

Follow-up will include:

☐ Manager observation☐ Trainer review☐ SOP review☐ Checklist review☐ Retraining☐ Performance correction☐ Shift follow-up☐ Other: _____

Manager Notes:

ACKNOWLEDGMENT

Employee Signature: _____

Manager Signature: _____ Date: _____

Employee signature confirms this conversation was reviewed. It does not necessarily mean the employee agrees with every detail.

PERFORMANCE CORRECTION LOG

Employee Name:

Position:

Department:

☐ Front of House

☐ Back of House

☐ Bar

☐ Dish

☐ Management

☐ Other: _____

Manager Name:

Date of Correction:

Purpose:

Use this log when an employee's performance needs formal correction.

This form should be used when a standard has been missed, a problem has repeated, or the issue is serious enough that a simple coaching conversation is not enough.

Performance correction should be clear, specific, and connected to a restaurant standard.

The goal is to correct the issue, protect the operation, and give the employee a clear path forward.

ISSUE SUMMARY

What happened?

Date issue occurred:

Observed by:

Was this issue previously discussed?

☐ Yes

☐ No

☐ Not sure

If yes, date of previous coaching or retraining:

STANDARD MISSED

What standard, policy, checklist, SOP, or expectation was missed?

Why does this standard matter?

- ☐ Guest experience
- ☐ Food quality
- ☐ Food safety
- ☐ Sanitation
- ☐ Labor control
- ☐ Cash control
- ☐ Teamwork
- ☐ Speed of service
- ☐ Opening readiness
- ☐ Closing readiness
- ☐ Professional behavior
- ☐ Other: _____

PERFORMANCE CATEGORY

This correction is related to:

- ☐ Attendance
- ☐ Service
- ☐ Food quality
- ☐ Cleaning
- ☐ Safety
- ☐ Sanitation
- ☐ Side work
- ☐ Opening duties
- ☐ Closing duties
- ☐ Cash handling
- ☐ POS use
- ☐ Communication
- ☐ Teamwork
- ☐ Policy
- ☐ Other: _____

CORRECTIVE EXPECTATION

What must improve?

What should the employee do differently moving forward?

By when must improvement happen?

SUPPORT OR RETRAINING OFFERED

- ☐ SOP reviewed
- ☐ Checklist reviewed
- ☐ Trainer assigned
- ☐ Manager demonstrated correct standard
- ☐ Employee practiced correct standard
- ☐ Follow-up observation scheduled
- ☐ Additional training shift assigned
- ☐ Other: _____

FOLLOW-UP PLAN

Follow-up required?

- ☐ Yes
- ☐ No

Follow-up date: _____

Follow-up will be completed by:

If the issue does not improve, next action may include:

- ☐ Additional coaching
- ☐ Additional retraining
- ☐ Written correction
- ☐ Position review
- ☐ Schedule adjustment
- ☐ Manager meeting
- ☐ Other: _____

EMPLOYEE COMMENTS

ACKNOWLEDGMENT

Employee Signature: _____

Manager Signature: _____ Date: _____

Employee signature confirms this correction was reviewed. It does not necessarily mean the employee agrees with every detail.

RETRAINING ASSIGNMENT LOG

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Trainer Assigned:

Date Assigned:

Purpose:

Use this log when an employee needs additional training on a task, station, procedure, or standard.

Retraining should be assigned when the employee does not yet meet the standard, when a process changes, or when the manager needs to verify that the employee can perform the task correctly.

Retraining should be specific.

Do not write "needs to do better."

Write the exact standard that needs to be reviewed, practiced, and verified.

RETRAINING REASON

Retraining is being assigned because:

- ☐ Task was missed
- ☐ Task was performed incorrectly
- ☐ Employee needs repeated reminders
- ☐ SOP changed
- ☐ Checklist was not followed
- ☐ Safety issue occurred
- ☐ Sanitation issue occurred
- ☐ Guest complaint occurred
- ☐ Food quality issue occurred
- ☐ Cash handling issue occurred
- ☐ Opening duty was missed
- ☐ Closing duty was missed
- ☐ Manager observation found a gap
- ☐ Other: _____

Specific issue:

STANDARD TO BE RETAINED**Task, station, SOP, or standard to review:****Correct result expected:****RETRAINING METHOD****Retraining will include:**

- ☐ Manager explanation
- ☐ Trainer demonstration
- ☐ Employee practice
- ☐ SOP review
- ☐ Checklist review
- ☐ Shadow shift
- ☐ Station walk-through
- ☐ Live shift observation
- ☐ Written review
- ☐ Final manager approval
- ☐ Other: _____

Employee must demonstrate:**RETRAINING SCHEDULE****Retraining start date:****Retraining completion deadline:****Assigned trainer or manager:****Follow-up review date:**

COMPLETION REQUIREMENTS**Retraining is complete when:**

- ☐ Employee can explain the correct standard.
- ☐ Employee can perform the task correctly.
- ☐ Employee follows safety rules.
- ☐ Employee follows sanitation rules.
- ☐ Employee completes the task without constant reminders.
- ☐ Employee understands when to ask for help.
- ☐ Manager or trainer observes the employee.
- ☐ Completion is documented.

Manager Notes:

RETRAINING APPROVAL

Retraining completed?

- ☐ Yes
- ☐ No
- ☐ In progress

Employee ready to return to standard expectation?

- ☐ Yes
- ☐ No
- ☐ Needs more practice

Follow-up still required?

- ☐ Yes
- ☐ No

Employee Signature: _____

Trainer Signature: _____

Manager Signature: _____ Date: _____

FOLLOW-UP REVIEW PAGE

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Original Coaching / Retraining Date:

Follow-Up Review Date:

Purpose:

Use this page to document whether coaching, correction, or retraining actually improved performance. A follow-up is where the manager confirms whether the issue was resolved, improved, or still needs attention. Without follow-up, coaching can become just a conversation. A strong manager follows up on what was discussed.

ORIGINAL ISSUE REVIEW

Original issue or standard missed:

Original action taken:

- ☐ Coaching conversation
- ☐ Performance correction
- ☐ Retraining assigned
- ☐ SOP reviewed
- ☐ Checklist reviewed
- ☐ Trainer assigned
- ☐ Manager observation
- ☐ Other: _____

Expected improvement:

FOLLOW-UP OBSERVATION

Since the original conversation, the employee's performance has:

- ☐ Improved
- ☐ Improved slightly
- ☐ Stayed the same
- ☐ Gotten worse
- ☐ Not yet observed

Manager observation notes:

STANDARD CHECK

Employee now understands the standard:

- ☐ Yes
- ☐ No
- ☐ Somewhat

Employee is following the standard:

- ☐ Yes
- ☐ No
- ☐ Sometimes

Employee still needs reminders:

- ☐ Yes
- ☐ No
- ☐ Sometimes

Employee needs more training:

- ☐ Yes
- ☐ No
- ☐ Not sure

FOLLOW-UP DECISION

- ☐ Issue resolved
- ☐ Continue monitoring
- ☐ Additional coaching needed
- ☐ Additional retraining needed
- ☐ Performance correction needed
- ☐ Manager meeting needed
- ☐ Position review needed
- ☐ Other: _____

NEXT ACTION**Action to be taken:**

Person responsible: _____**Deadline:** _____**Next follow-up date:**

EMPLOYEE COMMENTS

MANAGER NOTES

ACKNOWLEDGMENT

Employee Signature: _____

Manager Signature: _____ Date: _____

REPEATED ISSUE TRACKER

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Tracking Start Date:

Purpose:

Use this tracker when the same issue keeps happening after coaching, correction, or retraining.

A repeated issue may mean the employee needs more training, clearer expectations, stronger accountability, a position review, or a manager follow-up plan.

Repeated issues should not be ignored.

When the same problem happens again and again, managers need documentation that shows what happened, what action was taken, and whether the employee improved.

This tracker helps managers see patterns instead of treating every incident like a separate surprise.

REPEATED ISSUE SUMMARY

Issue being tracked:

Standard or expectation connected to this issue:

Why this issue matters:

- ☐ Guest experience
- ☐ Food quality
- ☐ Food safety
- ☐ Sanitation
- ☐ Labor control
- ☐ Cash control
- ☐ Teamwork
- ☐ Speed of service
- ☐ Opening readiness
- ☐ Closing readiness

☐ Professional behavior

☐ Other: _____

ISSUE HISTORY

First time issue was observed:

Date: _____

What happened?

Action taken:

☐ Coaching

☐ Retraining

☐ Performance correction

☐ SOP review

☐ Checklist review

☐ Manager observation

☐ Other: _____

Second time issue was observed:

Date: _____

What happened?

Action taken:

☐ Coaching

☐ Retraining

☐ Performance correction

☐ SOP review

☐ Checklist review

☐ Manager observation

☐ Other: _____

Third time issue was observed:

Date: _____

What happened?

Action taken:

☐ Coaching

☐ Retraining

☐ Performance correction

☐ SOP review

☐ Checklist review

☐ Manager observation

☐ Other: _____

PATTERN REVIEW

Does this issue happen:

☐ During busy shifts

☐ During closing

☐ During opening

☐ With certain tasks

☐ With certain managers

☐ When employee is unsupervised

☐ After days off

☐ When station is understaffed

☐ When communication is weak

☐ Other: _____

Possible cause of repeated issue:

☐ Training gap

☐ Lack of understanding

☐ Lack of follow-through

☐ Effort issue

☐ Communication issue

☐ Time management issue

☐ Accountability issue

☐ Process issue

☐ Tool or equipment issue

☐ Staffing issue

☐ Other: _____

MANAGER DECISION

Next action:

☐ Additional coaching

☐ Additional retraining

☐ Written performance correction

☐ Manager meeting

☐ Position review

☐ Schedule adjustment

☐ Trainer reassignment

☐ Final warning according to company policy

☐ Other: _____

Action plan:

Follow-Up Date: _____

Manager Notes:

Employee Signature: _____

Manager Signature: _____ Date: _____

Employee signature confirms this tracker was reviewed. It does not necessarily mean the employee agrees with every detail.

MANAGER ACTION PLAN

Employee Name:

Position:

Department:

- ☐ Front of House
- ☐ Back of House
- ☐ Bar
- ☐ Dish
- ☐ Management
- ☐ Other: _____

Manager Name:

Date:

Purpose:

Use this page when a manager needs a clear plan to help an employee improve, correct a repeated issue, complete retraining, or meet a required standard.

A manager action plan should be specific.

It should explain the issue, the expected result, the support being provided, the deadline, and how improvement will be measured.

This page can be used after coaching, retraining, performance correction, repeated issue tracking, or a manager review.

MAIN ISSUE TO ADDRESS

What issue needs action?

What standard should the employee meet?

Why does this matter to the restaurant?

- ☐ Guest experience
- ☐ Food quality
- ☐ Safety
- ☐ Sanitation
- ☐ Labor control
- ☐ Cash control
- ☐ Teamwork
- ☐ Service speed
- ☐ Opening readiness
- ☐ Closing readiness
- ☐ Training consistency

☐ Other: _____

ACTION PLAN

Step 1:

Person responsible: _____

Deadline: _____

Step 2:

Person responsible: _____

Deadline: _____

Step 3:

Person responsible: _____

Deadline: _____

Step 4:

Person responsible: _____

Deadline: _____

SUPPORT PROVIDED

- ☐ Manager coaching
- ☐ Trainer support
- ☐ SOP review
- ☐ Checklist review
- ☐ Additional practice
- ☐ Shadow shift
- ☐ Station walkthrough
- ☐ Written instructions
- ☐ Follow-up observation
- ☐ Other: _____

How support will be provided:

MEASURING IMPROVEMENT

Improvement will be measured by:

- ☐ Manager observation
- ☐ Completed checklist
- ☐ Reduced mistakes
- ☐ Guest feedback
- ☐ Food quality check
- ☐ Cleaning inspection
- ☐ Cash/POS accuracy
- ☐ Opening or closing inspection
- ☐ Trainer feedback
- ☐ Follow-up meeting
- ☐ Other: _____

Expected result:

Deadline for improvement:

FOLLOW-UP REVIEW**Follow-up date:** _____**Follow-up completed by:**

Result of follow-up:

- ☐ Improved
- ☐ Improved slightly
- ☐ No improvement
- ☐ Issue repeated
- ☐ Additional action needed
- ☐ Issue resolved

Manager notes:

FINAL DECISION

- ☐ Continue monitoring
- ☐ Action plan completed
- ☐ Additional coaching required
- ☐ Additional retraining required
- ☐ Performance correction required
- ☐ Position review required
- ☐ Other: _____

Employee Comments:

ACKNOWLEDGMENT

Employee Signature: _____

Manager Signature: _____ Date: _____

Employee signature confirms this action plan was reviewed. It does not necessarily mean the employee agrees with every detail.