



ARDENT WORKSHOP

AN ARDENT WORKSHOP PRODUCT

Coaching Note & Verbal-Warning Record

Two free fillable records, each also shown filled in.

2 documents · free · no signup

General template — not legal advice.



Two records, each shown twice

These are the two earliest steps in a performance conversation, and the two easiest to skip when time is short — which is exactly why a file that jumps straight to a formal warning looks sudden. Each one appears twice: **blank and fillable**, so you can click a highlighted field and type, and then **filled in for invented people at an invented company**, so you can see how much detail is enough before you write a word.

HOW TO FILL THEM IN

Open this PDF in a PDF reader and click any field highlighted in amber — they are real form fields, not pictures of blanks. Many are pre-filled with their own label, so select the label and type over it; the table cells and signature lines start blank, named by their column header or row label. The wide three-line blocks want real detail. If they will not click (some browser and phone viewers show PDFs flat), save the file and open it in the free Adobe Acrobat Reader, or print it and fill it in by hand. What signing does, and what to do if someone declines to sign, is printed on each document's own signature page.

PLEASE READ

These are general templates and general guidance, not legal advice, and downloading them does not create a lawyer-client relationship. Employment rules differ by country, state and situation, and they change. Neither of these two documents is written as a formal disciplinary action, and your own handbook may treat them differently. Neither one decides what happens next - that depends on where you are, on what your own handbook already promises, and on the facts. Have qualified counsel or an HR professional review anything before you issue it, particularly anything that might lead to a written warning or further action. Where a clause turns on your jurisdiction, this file flags it and asks rather than answering.

What is in this free download

- **Coaching Note** — the record of an informal conversation. Not discipline, and it says so on its face. Blank, then filled in.
- **Verbal Warning Record** — the written record of a spoken warning, which is not a contradiction. Blank, then filled in.
- For each: what it is for, common mistakes to avoid, a rewrite panel, the file it belongs in with a suggested retention period, and where your jurisdiction decides.

06 of 24 · COACHING NOTE

Records an informal coaching conversation - not discipline - with what was said and agreed.

A record of an informal coaching conversation between a manager and an employee: what was observed, what was discussed, and what both sides agreed to going forward. It is explicitly not a disciplinary document - it exists so that ordinary coaching, the kind every manager does, leaves a paper trail instead of disappearing the moment the conversation ends.

When to use it: Use it after any coaching conversation worth remembering - a missed deadline, a rough customer interaction, a skill gap - before it either resolves on its own or becomes a pattern.

Common mistakes to avoid:

- Writing what was observed as a judgment ('careless,' 'unprofessional') instead of the specific, dated fact that prompted the conversation - a judgment can't be checked against anything later, a fact can.
- Using this form when the conversation was actually a warning, or using a warning form for what was really just coaching - the label on the document should match what the conversation actually was.
- Never following up on the review date, so the note sits in the file with no record of whether the coaching worked.

Write it so it survives being read back to you:

WHAT MANAGERS WRITE	WHAT TO WRITE INSTEAD
has a bad attitude lately	Raised their voice and said 'this is a waste of my time' during the team meeting on February 12, 2026, when asked to walk through the weekly numbers.
Invented example.	

DO NOT DELETE THIS CLAUSE

6. Next Check-In — Without a stated date to look at this again, coaching becomes a one-time event with no way to show whether it worked - which is exactly the gap that shows up if this situation later needs a written warning built on a pattern.

WHERE YOUR JURISDICTION DECIDES, NOT US

This is an informal management record, not a disciplinary action, so it generally does not trigger the notice or process requirements that formal warnings can in some states. It can still matter later, though, since a documented pattern of coaching notes is often what makes a subsequent warning look justified rather than sudden. If this conversation is part of a pattern that might lead to formal discipline later, keep dated notes like this one on file.

FILL THIS ONE IN

COACHING NOTE

FILE IT IN

Personnel file

Kept as an informal record; not a disciplinary action, but useful history if a pattern develops.

KEEP IT FOR

3 years after separation

This note records an informal coaching conversation between _____ and _____ on _____. This is a coaching record, not a disciplinary warning.

1. What Was Observed

The following was observed and prompted this conversation:

Date	What was observed - specific, factual	Effect it had

2. The Conversation

This conversation took place on _____, between _____ and _____.

What was said:

3. What We Agreed

_____ agreed to:

_____ agreed to:

4. Support Offered

5. Why This Is Coaching, Not Discipline

This note documents a coaching conversation, not a warning or other disciplinary action. It does not affect _____'s standing, pay, or employment status. It exists so that both sides have the same, specific record of what was discussed.

6. Next Check-In

This will be looked at again on _____. If things have improved, no further note is needed. If not, _____ will decide on next steps at that time.

File this note in the personnel file. If _____ shows continued concerns, this note becomes useful history for whatever comes next.

SIGNATURES

Signing confirms the conversation happened and that the employee heard what was discussed - it is not an admission of fault and does not mean the employee agrees with everything said. If they decline to sign, write that on the note, along with the date, and keep it in the file as written.

Employee (acknowledging the conversation)

Name:

Signature:

Date:

Manager

Name:

Signature:

Date:

WORKED EXAMPLE

The same document, filled in

The words **in amber** are the ones the manager typed; everything else is the template as it ships. The example fills in only some of the sections, so the numbering skips ahead; the blank copy above has the full set.

COACHING NOTE

Every name and date below is invented.

This note records an informal coaching conversation between **Priya Chen** and **Marisol Ferreira** on **February 12, 2026**. This is a coaching record, not a disciplinary warning.

1. What Was Observed

Date	What was observed - specific, factual	Effect it had
February 12, 2026	Raised voice and said 'this is a waste of my time' during the team meeting when asked to walk through the weekly numbers	Meeting ran long and two team members mentioned it afterward
January 29, 2026	Left a customer email unanswered for four business days past the team's one-day response standard	Customer called the office asking for an update
January 15, 2026	Submitted the weekly report two days after the Friday deadline	Priya had to delay the Monday leadership update
December 18, 2025	Interrupted a team member three times during a project handoff meeting	The team member asked to finish the handoff by email instead

3. What We Agreed

Marisol Ferreira agreed to: **raise concerns about process changes directly with Priya instead of in a group meeting, starting with the reporting template question this week.**

Priya Chen agreed to: **give the team advance notice before changing shared templates or processes going forward.**

6. Next Check-In

This will be looked at again on **March 12, 2026**. If things have improved, no further note is needed. If not, **Priya Chen** will decide on next steps at that time.

07 of 24 · VERBAL WARNING RECORD

The written record confirming that a verbal warning was given, and what it covered.

A written record confirming that a verbal warning was given: what conduct or performance prompted it, what was said, and what happens if it continues. The warning itself is spoken, in the room, but the record has to be written - otherwise there is no way to show later that it happened at all. It usually follows one or more coaching conversations that did not resolve the issue.

When to use it: Use it right after delivering a verbal warning, ideally the same day, while the specifics are still fresh and accurate.

Common mistakes to avoid:

- Delivering the warning verbally and then never writing it down, so six months later there's no record it happened - which makes a later written warning look like it came out of nowhere.
- Skipping the prior-conversations table because the issue feels obvious in the moment, which erases the exact pattern that justified moving from coaching to a warning.
- Making a specific promise about what will happen next ('you'll be terminated') instead of describing the standard and letting the actual next step be decided when and if it's needed.

Write it so it survives being read back to you:

WHAT MANAGERS WRITE	WHAT TO WRITE INSTEAD
keeps messing up, this can't continue	Arrived after the 9:00 am opening shift start time on four occasions in the past three weeks: February 3, 10, 17, and 24, 2026, each between 12 and 40 minutes late.
Invented example.	

DO NOT DELETE THIS CLAUSE

2. Prior Conversations — This is what separates a verbal warning from a warning that seems to come out of nowhere. Without a documented history, there is no way to show this was the next step after conversations that did not resolve the issue.

WHERE YOUR JURISDICTION DECIDES, NOT US

How much detail a verbal warning needs to include, and whether any advance process (like a chance to respond) applies before a warning stage, varies by state and by any policy your own handbook already promises. Some employers' own handbooks describe a specific number of steps before a warning is issued, which can matter more than what the law technically requires. If your handbook describes a specific progressive discipline process, check that this warning matches the step it describes before you rely on it.

FILL THIS ONE IN

VERBAL WARNING RECORD

FILE IT IN**Personnel file**

Documents that a verbal warning occurred, in case a pattern develops.

KEEP IT FOR**3 years after separation**

This record confirms that gave a verbal warning on regarding

The warning itself was spoken; this document is the written record of it.

1. The Issue

2. Prior Conversations

This is not the first conversation about this issue. Prior conversations:

Date	Type of conversation	What was discussed

3. What Was Said

In this conversation, told :

4. The Standard Expected

Going forward, the expectation is: .

5. If This Continues

CHECK LOCALLY

If this continues, _____ may move to a written warning or further action, up to and including termination, consistent with our usual practice. What can be said about specific next steps, and how discipline must be documented, varies by state and by any process your own handbook promises - check this paragraph against both before relying on it.

6. Review Date

This will be reviewed again on _____. _____ was told this record will be kept on file.

File this record in the personnel file alongside any prior coaching notes it references.

SIGNATURES

Signing confirms the conversation took place as described, not that the employee agrees with the warning. If they decline to sign, write that on the record along with the date and keep it in the file as written.

Employee (acknowledging the conversation)

Name:

Signature:

Date:

Manager

Name:

Signature:

Date:

WORKED EXAMPLE

The same document, filled in

The words **in amber** are the ones the manager typed; everything else is the template as it ships. The example fills in only some of the sections, so the numbering skips ahead; the blank copy above has the full set.

VERBAL WARNING RECORD

Every name, company and date below is invented.

This record confirms that **Deshawn Ortiz** gave **Jordan Vasquez** a verbal warning on **February 24, 2026** regarding **repeated late arrivals to the opening shift**. The warning itself was spoken; this document is the written record of it.

1. The Issue

Jordan has arrived after the scheduled 9:00 am opening shift start time on four occasions in the past three weeks: February 3, 10, 17, and 24, 2026, each between 12 and 40 minutes late.

2. Prior Conversations

Date	Type of conversation	What was discussed
January 20, 2026	Informal conversation	Deshawn mentioned two late arrivals the prior week and asked if anything was going on
February 3, 2026	Coaching note on file	Discussed the opening shift start time and agreed Jordan would set an earlier alarm
February 10, 2026	Informal conversation	Deshawn reminded Jordan of the 9:00 am standard after another late arrival
February 17, 2026	Coaching note on file	Follow-up coaching note documenting continued lateness and offering a schedule swap to a later shift, which Jordan declined

5. If This Continues

CHECK LOCALLY If this continues, **Quillmore Supply Co** may move to a written warning or further action, up to and including termination, consistent with our usual practice. What can be said about specific next steps, and how discipline must be documented, varies by state and by any process your own handbook promises - check this paragraph against both before relying on it.

These are 2 of 24

The other twenty-two cover the rest of the relationship: the offer letter and job description, a first-day document checklist, the introductory-period review, a role, pay or schedule change letter, the written and final written warnings, a performance improvement plan, an attendance record and concern letter, a leave-request response, a return-to-work note, an accommodation interactive-process letter, investigation interview notes and an outcome summary, a resignation acknowledgment, a separation letter, a final-pay and offboarding checklist, an employment-verification response, a reference-request policy response, an issued-document log, and an index for each of the two employee files.

THE FULL PACK

Any single one of these letters is free somewhere, and this file says so. What the **HR Letters & Employment-Document Template Pack** adds is the chain around them: a printable router mapping 40 workplace situations to the document each one calls for, in issue order, naming the document the router suggests should already be on file; a filing and retention schedule covering all twenty-four; an issued-document log that turns a folder of letters into a record; a 66-page guide giving every document its own page; and an editable Word version of all twenty-four alongside the fillable PDFs. One purchase you keep — files on your own drive, not a per-seat subscription that stops the day you stop paying.

[See the full pack at ardentworkshop.com](https://ardentworkshop.com) >

This file is free to use and share within your own organization — hand it to another manager, keep it on a shared drive, print it for a supervisor who needs one form today.

ONE LAST REMINDER

General templates and general guidance, not legal advice, and downloading them does not create a lawyer-client relationship. Neither of these two documents is written as a formal disciplinary action, and your own handbook may treat them differently. Employment rules differ by country, state and situation, and they change - have qualified counsel or an HR professional review anything before you issue it. The full note is in PLEASE READ, on the first page after the cover.

© Ardent Workshop LLC. Free to use and share within your own organization. Please don't resell or redistribute.