

# Performance Improvement Plan Action Plan Template Example

Employee Name	Jason Desjardins	Role / Title	Customer Service Representative	Employee Id	TM-123
Supervisor	Olivia Carter	Department	Customer Experience	Date	7/1/2025

## Areas Of Concern

In what areas has the employee not met expectations?

Inconsistent response times when handling customer inquiries through live chat and email. Needs improvement in meeting internal SLAs for resolution time.

## Previously Addressed Issues

Provide details of any previously addressed issues, the context, and the outcome of discussions or training.

### Observations

- Responds professionally, but delays frequently exceed expected response time
- Handles escalations well but often waits too long before escalating

### Previous Discussions

- Weekly 1:1 meetings have addressed time management concerns since April
- Discussed prioritizing high-volume times and using message templates to improve efficiency

### Additional Training

- Time Management Workshop – Scheduled for July 3
- Peer shadowing with top-performing agent – July 8–9

## Improvement Goals

Detail goals in relation to areas of concern that need to be addressed and improved.

Goal #	Goal Description	Issue Addressed By Meeting Goal
1	Reduce average response time to under 2 minutes on live chat	Delays in customer response
2	Meet 95% of weekly ticket resolution SLA	Inconsistent resolution timeline

## Expectations

To demonstrate progress toward improvement goal achievement, the following performance standard expectations must be met.

Expectation Description
Consistently use CRM tools to prioritize ticket responses
Monitor the queue during high-traffic times without supervisor reminders
Attend all scheduled training and apply techniques learned in daily tasks

## Goal Activities

List activities that will aid in achieving the improvement goals set above.

Goal #	Activity	Start Date	Projected Date Of Completion
1	Live chat simulation training	7/3/2025	7/3/2025
2	Daily review of open tickets at 10 AM	7/2/2025	Ongoing

## Resources

List resources available to complete goal activities; for example, training materials, training activities, seminars, peer mentoring, management support, etc.

Resource Name	Description Of Resource
Time Management Workshop	2-hour internal training focused on prioritization and task batching
Peer Mentoring	Assigned peer mentor to shadow for 2 days and share tips

## Progress Monitoring

Provide an evaluation schedule to monitor the progress of improvement activities.

### Follow-Up Schedule

Date Scheduled	Activity	Conducted By	Date Completed

### Progress Benchmarks

Goal #	Activity	Date Of Check	Follow-Up Method <small>Phone, Email, Mtg.</small>	Expected Progress	Comments

### Timeline For Improvement, Consequences, And Expectations

Provide a summary of any terms placed on the performance improvement plan, consequences of insufficient effort, and any legal concerns, such as confidentiality as related to this document.

This performance improvement plan will span 45 days beginning July 1, 2025. Jason is expected to actively participate in all activities and show measurable progress toward defined goals. No formal disciplinary action is associated with this plan, and its intent is developmental. Performance will be re-evaluated at each milestone and again at the end of the 45-day period.

## Signatures

Employee Name	Employee Signature	Date
Jason Desjardins		

Supervisor Name	Supervisor Signature	Date
Olivia Carter		

Employee Name		Role / Title		Employee Id	
Supervisor		Department		Date	

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Provide details of any previously addressed issues, the context, and the outcome of discussions or training.

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[illegible]

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## Signatures

Employee Name	Employee Signature	Date

Supervisor Name	Supervisor Signature	Date

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