**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=12401&utm_source=template-word&utm_medium=content&utm_campaign=SEO)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**

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| --- |
| - 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 |
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# Expectations

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

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| --- |
| **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 |
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# 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 |
|  |  |
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|  |  |

# Progress Monitoring

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

## **Follow-Up Schedule**

|  |  |  |  |
| --- | --- | --- | --- |
| **Date Scheduled** | **Activity** | **Conducted By** | **Date Completed** |
| 7/30/2025 | 30-Day Review | Olivia Carter |  |
| 8/14/2025 | 45-Day Review | Olivia Carter |  |
|  | 60-Day Review |  |  |
|  | 90-Day Review |  |  |

## **Progress Benchmarks**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Goal #** | **Activity** | **Date Of Check** | **Follow-Up Method**  Phone, Email, Mtg. | **Expected Progress** | **Comments** |
| 1 | Chat response time analysis | 7/15/2025 | Meeting | 80% of responses under 2 minutes |  |
| 2 | Ticket resolution report | 7/29/2025 | Email | 90–95% of tickets within SLA |  |
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## **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 |  |  |

**Performance Improvement Plan Action Plan Template**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Employee Name** |  | **Role / Title** |  | **Employee Id** |  |
| **Supervisor** |  | **Department** |  | **Date** |  |

## **Areas Of Concern**

In what areas has the employee not met expectations?

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|  |

# Previously Addressed Issues

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

## **Observations**

|  |
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|  |

## **Previous Discussions**

|  |
| --- |
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## **Additional Training**

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# Improvement Goals

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

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| **Expectation Description** |
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## **Progress Benchmarks**

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| --- |
|  |

# Signatures

| Employee Name | Employee Signature | Date |
| --- | --- | --- |
|  |  |  |

| Supervisor Name | Supervisor Signature | Date |
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