**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=12344&utm_source=template-word&utm_medium=content&utm_campaign=Example+Performance+Improvement+Plan+(PIP)-word-12344&lpa=Example+Performance+Improvement+Plan+(PIP)+word+12344)Performance Improvement Plan (PIP) Template Example**

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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Employee | Carmen Robertson | | | | | | | | | | | | |
| Job Title | Customer Support Representative | | | | | | | | | | | | |
| Department | Client Services | | | | | | | | | | | | |
| Manager / Supervisor | Devon Gomez | | | | | | | | | | | | |
| Plan Date | MM/DD/YY | | | | | | | | | | | | |
|  | |  | |  |  |  |  |  |  |  |  |  | | |  |  |
| Improvement Areas and Expectations | | | | | | | | | | | | | | | | |
| **Category** | | | **Description** | | | | | | | | | |
| Improvement Areas | | | Response time to customer inquiries, adherence to company communication guidelines | | | | | | | | | |
| Expected Performance Standards | | | Respond to support tickets within 24 hours and maintain a 95% customer satisfaction rating | | | | | | | | | |
| Impact of Performance Gaps | | | Delayed responses cause decreased customer satisfaction and increased escalation cases | | | | | | | | | |
| Previous Feedback and Support | | | Provided coaching on email response structure and call-handling techniques | | | | | | | | | |

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| Development Support and Resources | | | | | | | | | | | | | | |
| **Category** | | **Description** | | | | | | | | | |
| Available Company Resources | | Internal customer service training, knowledge base, call script templates | | | | | | | | | |
| Technology and Tools Needed | | CRM system access, customer analytics dashboard | | | | | | | | | |
| Manager/Team Support | | Weekly check-ins with manager, peer coaching from senior representatives | | | | | | | | | |
| Time Allocation | | One hour daily for skill improvement and training | | | | | | | | | |
| Potential Roadblocks | | Difficulty managing high ticket volume, inconsistent adherence to scripts | | | | | | | | | |

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| Training, Education, and Certification Costs | | | | | | | | | | | | | | | |
| **Category** | | **Description** | | | **Estimated Cost** | | | | | | | |
| Required Job-Specific Training | | Advanced customer service techniques workshop | | | $500.00 | | | | | | | |
| Compliance and Regulatory Certifications | | Call handling compliance training | | | $200.00 | | | | | | | |
| Skill Remediation Programs | | Personalized coaching sessions with senior representative | | | $300.00 | | | | | | | |
| One-on-One Coaching or Counseling | | Conflict resolution training | | | $250.00 | | | | | | | |
| Technology and Tools Needed | | CRM reporting module training | | | $150.00 | | | | | | | |

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| Performance Goals (SMART) | | | |
| **SMART** | **Goal** | **Timeframe** |
| Specific | Reduce average customer response time from 48 hours to 24 hours | Three months |
| Measurable | Achieve a 95% customer satisfaction score on feedback surveys | By the end of the PIP |
| Achievable | Utilize training resources and team support to improve service efficiency | Ongoing |
| Relevant | Directly impacts customer experience and retention | Immediate business need |
| Time-Bound | Meet all improvement targets by the final review date | Three-month evaluation |

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| Action Plan | | | | | | | | | | | | | | | | |
| **Improvement Activity** | | | | | | **Target Date** | | | **Owner** | | | | **Status** | | |
| Skill Training/Coaching | | | | | | MM/DD/YY | | | Employee | | | | In Progress | | |
| Job Shadowing/Mentorship | | | | | | MM/DD/YY | | | Senior Support Representative | | | | Not Started | | |
| Process Adherence Check | | | | | | MM/DD/YY | | | Manager | | | | Scheduled | | |
| Behavioral Adjustment/Soft Skills | | | | | | MM/DD/YY | | | Employee | | | | Not Started | | |
| Performance Review | | | | | | MM/DD/YY | | | Manager | | | | Pending | | |
| Next Review | | | | | | MM/DD/YY | | | Manager | | | | Pending | | |
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|  | **Week 1** | **Week 2** | **Week 3** | **Week 4** | **Week 5** | | **Week 6** | **Week 7** | | **Week 8** | **Week 9** | **Week 10** | | **Week 11** | **Week 12** | |
| Skill Training/Coaching | **X** | **X** | **X** | **X** |  | |  |  | |  |  |  | |  |  | |
| Job Shadowing/Mentorship |  |  |  |  | **X** | | **X** | **X** | |  |  |  | |  |  | |
| Process Adherence Check |  |  |  |  |  | |  |  | | **X** | **X** |  | |  |  | |
| Behavioral Adjustment/Soft Skills |  |  |  |  |  | |  |  | |  |  | **X** | | **X** | **X** | |
| Performance Review |  |  |  |  |  | |  |  | |  |  |  | |  | **X** | |

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| Success Metrics and Evaluation | | | | | | | | | | | | | |
| **Metric** | | | **Description** | | | | | **Measurement** | | | |
| Key Performance Indicators (KPIs) | | | Response time, first-call resolution rate, customer satisfaction | | | | | Weekly and monthly reports | | | |
| Behavioral Improvements | | | Active listening professionalism in customer interactions | | | | | Call and email quality audits | | | |
| Performance Review Schedule | | | Formal review at the three-month mark, biweekly check-ins | | | | | Manager evaluations | | | |
| Feedback Collection Methods | | | Customer surveys, peer feedback, manager coaching sessions | | | | | Survey data and review reports | | | |
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| Performance Outcomes | | | | | | | | | | | | | |
| **Outcome** | | **Description** | | | | | | | | | |
| Successful Completion | | The employee met all improvement targets, and no further action was required | | | | | | | | | |
| Partial Improvement | | The employee showed progress but did not fully meet expectations; extended coaching required | | | | | | | | | |
| Unsatisfactory Progress | | The employee did not meet improvement standards; further action required | | | | | | | | | |

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| Review and Acknowledgement | | |
| Reviewed By | Employee |
| Title | Customer Support Representative |
| Name | Carmen Robertson |
| Date | MM/DD/YY |
| Reviewed By | Manager / Supervisor |
| Title | General Manager |
| Name | Devon Gomez |
| Date | MM/DD/YY |

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