**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 |
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| 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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