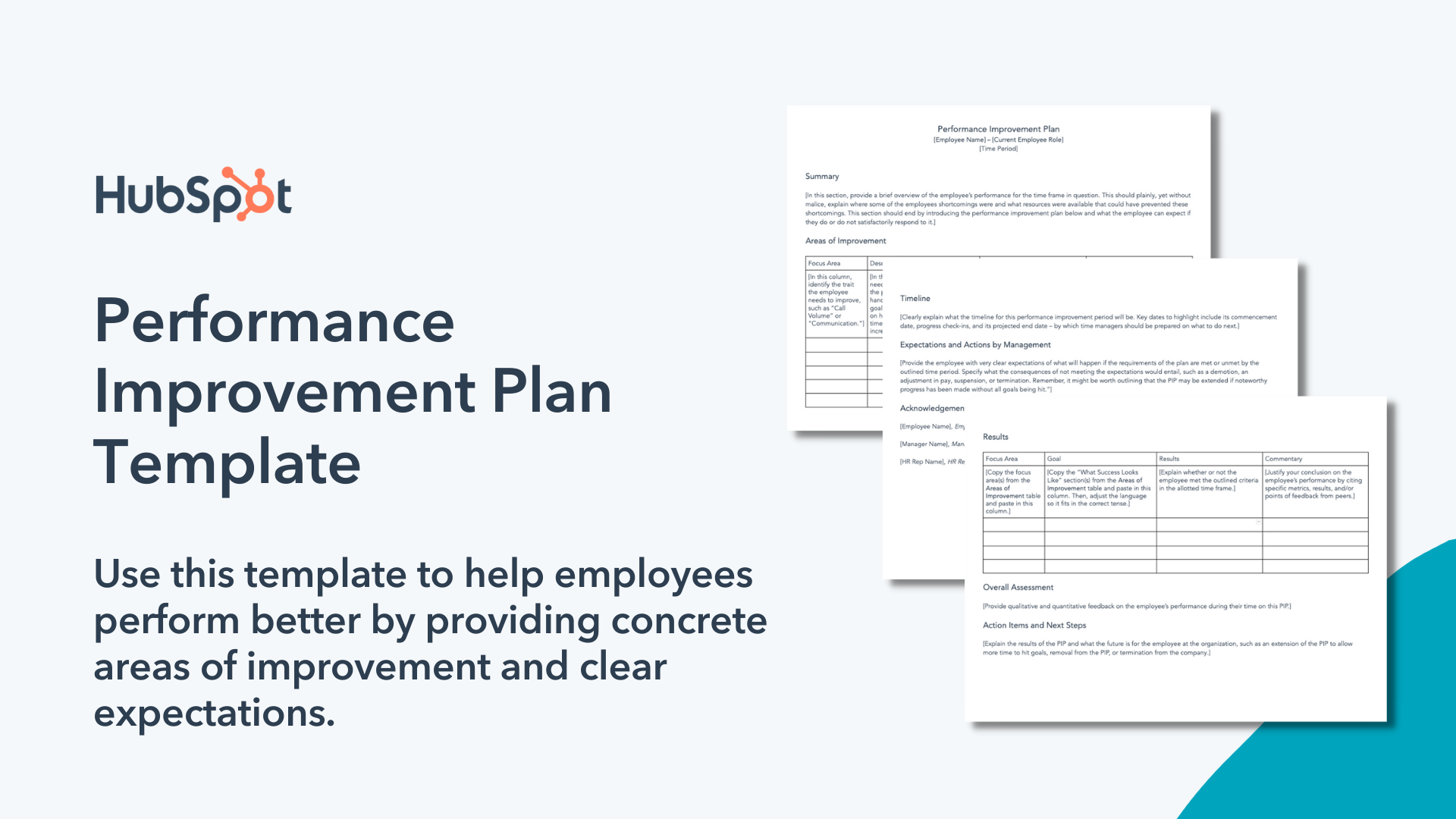
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| **Hi There.**  Thanks for Downloading This Resource.    You Can Edit Your Own Version in One of Two Ways:   1. Edit this version to fit your needs 2. Go to “File” > “Download As” > “Microsoft Word” to Download |
| ↓↓↓  How to Use This Template  This performance improvement plan (PIP) template was designed to help employees improve their skills in key areas of their job. Sometimes, employees fall behind and need clear, concrete instructions on how to improve their performance and a thorough understanding of what will happen if they are unable to meet the expectations of their job. This template will help them do just that.  In the template below, outline what the employee needs to work on, what **specific** goals they should aim for, what the timeline for this plan looks like, and what resources are available to them. Each section contains [instructions in brackets] that you should delete and replace with your own contents and instructions. You’ll also see a section to share the results of this PIP with your employee once it’s complete. Remember to be **extremely clear** with this document and its implications, and consider working with your HR and/or legal teams if someone’s employment status is at stake. Also, you should add, delete, or edit any sections as needed.  To help you build the best PIP, we’ve included an example of what a completed version might look like below the blank template. We hope this template is put to good use and helps you align employee performance with your organization’s needs! |

**Performance Improvement Plan**

**[Employee Name] – [Current Job Title]**

[Time Period]

**Summary**

[In this section, provide a brief overview of the employee’s performance for the time frame in question. This should plainly, yet without malice, explain where some of the employees shortcomings were and what resources were available that could have prevented these shortcomings. This section should end by introducing the performance improvement plan below and what the employee can expect if they do or do not satisfactorily respond to it.]

**Areas of Improvement**

|  |  |  |  |
| --- | --- | --- | --- |
| Focus Area | Description | What Success Looks Like | Resources |
| [In this column, identify the trait the employee needs to improve, such as “Call Volume” or “Communication.”] | [In this column, elaborate on what needs to be improved, such as “In the past six months, Janet has handled 70% of her support ticket goal. Doing so puts added pressure on her teammates and adds wait time to our customers, thus increasing the risk of churn.”] | [Give the employee a concrete target to aim towards in this document, such as “In the next month, Janet must meet or exceed 100% of her support ticket quota to display her capability in this core function of her role.”] | [Insert resources available to employees to help them hit this specific goal, such as internal documentation, training material, software, or recommended reading.] |
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**Timeline**

[Clearly explain what the timeline for this performance improvement period will be. Key dates to highlight include its commencement date, progress check-ins, and its projected end date – by which time managers should be prepared on what to do next.]

**Expectations and Actions by Management**

[Provide the employee with very clear expectations of what will happen if the requirements of the plan are met or unmet by the outlined time period. Specify what the consequences of not meeting the expectations would entail, such as a demotion, an adjustment in pay, suspension, or termination. Remember, it might be worth outlining that the PIP could be extended if noteworthy progress has been made without all goals being hit.]

**Acknowledgement Signatures**

[Employee Name], *Employee*: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[Manager Name], *Manager:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[HR Rep Name], *HR Representative*: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Results**

|  |  |  |  |
| --- | --- | --- | --- |
| Focus Area | Goal | Results | Commentary |
| [Copy the focus area(s) from the **Areas of Improvement** table and paste in this column.] | [Copy the “What Success Looks Like” section(s) from the **Areas of Improvement** table and paste in this column. Then, adjust the language so it fits in the correct tense.] | [Explain whether or not the employee met the outlined criteria in the allotted time frame.] | [Justify your conclusion on the employee’s performance by citing specific metrics, results, and/or points of feedback from peers.] |
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**Overall Assessment**

[Provide qualitative and quantitative feedback on the employee’s performance during their time on this PIP.]

**Action Items and Next Steps**

[Explain the results of the PIP and what the future is for the employee at the organization, such as an extension of the PIP to allow more time to hit goals, removal from the PIP, or termination from the company.]

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**EXAMPLE: Performance Improvement Plan**

**Janet Leigh – Customer Support Specialist**

Q4 2022

**Summary**

The customer support team is the frontline of customer satisfaction and retention at our organization, and we rely on our trusted customer support reps to handle assigned tickets in a timely, efficient, and polite manner. In the past six months, Janet’s customer satisfaction and NPS scores, her ticket resolution rate, and her attendance have not met our company’s high standards. Janet has had weekly check-ins with her manager, Alexis, to discuss these issues, and to date, they have not been sufficiently addressed.

As a result, Janet will be placed on a performance improvement plan, effective October 1, 2022, in an effort to bring Janet up to the high standards we know she is capable of reaching. Below are the concrete goals we expect Janet to achieve by **November 1, 2022**.

**Areas of Improvement**

|  |  |  |  |
| --- | --- | --- | --- |
| Focus Area | Description | What Success Looks Like | Resources |
| Call Volume | In the past six months, Janet has handled 70% of her support ticket goal. Doing so puts added pressure on her teammates and adds wait time to our customers, thus increasing the risk of churn. | In the next month, Janet must meet or exceed 100% of her support ticket quota to display her capability in this core function of her role. | * Internal training page on handling high call volume. * Twice-weekly check-ins with her manager on prioritization. |
| Customer Satisfaction Score | Our organization has a target CSAT of 4.1. For the past six months, Janet has averaged a 2.9. These low scores indicate Janet hasn’t provided the level of support we expect from our reps. | For the month of October, Janet needs to average at least a 3.8, or show significant progress towards attaining this goal. | * Internal training page: *How to Secure a Perfect CSAT score.* * Twice-weekly check-ins with her manager on metrics. |
| Attendance | Employees show their attentiveness and professionalism by logging on at or before 8:30 AM and attending all meetings unless there is an emergency. Janet routinely misses team meetings and our HR software notes her clock-in time is almost always after 9:00 AM. | To show her commitment to this role, Janet will be expected to be at her computer on or before 8:30 AM every day and in attendance of all team meetings, unless she has an excuse or emergency. | * Google Calendar to confirm meeting attendance. * HR and time clocking software to certify her punctuality. * “10 Tips for Being More Punctual” blog post. |

**Timeline**

This performance improvement plan goes into effect on **October 1, 2022** and will last 31 days, ending on **October 31, 2022.** Janet and her manager will meet on **November 1** to discuss the final outcome of this plan. Additionally, Janet’s manager has scheduled twice-weekly meetings to check-in on Janet’s daily progress and offer support where needed. Janet’s manager has also scheduled a halfway-point meeting on **October 15** to discuss overall progress and if any adjustments to this plan should be made.

**Expectations and Actions by Management**

Janet is expected to meet **all** requirements of this PIP on or before **October 31, 2022**. If these goals remain unmet, Janet will be placed on a one-month unpaid suspension while management assesses her future at this organization. If management feels substantial progress has been made without fully hitting her goals, this time period *may* be extended at their discretion. If all goals are met, Janet’s status within the organization will return to normal and she will no longer be subject to the plan’s constraints.

**Acknowledgement Signatures**

Janet Leigh, *Employee*: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Alexis Lopez, *Manager:* \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sean Sanderson, *HR Representative*: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Results**

|  |  |  |  |
| --- | --- | --- | --- |
| Focus Area | Goal | Results | Commentary |
| Call Volume | Janet was tasked with meeting or exceeding 100% of her support ticket quota to display her capability in this core function of her role. | For the month of October, Janet hit 104% of her support ticket quota. | Janet slowly but surely over-attained this goal. Despite emerging from the first week of October at 85%, she committed to seeing her task through. |
| Customer Satisfaction Score | For the month of October, Janet needed to average at least a 3.8, or show significant progress towards attaining this goal. | Janet’s CSAT was 4.0 for the month of October. | Janet exceeded this goal as well and came in just under the company average of 4.1. This was substantial progress and we look forward to Janet continuing to increase her CSAT and be on par with the rest of her peers. |
| Attendance | Janet was instructed to be at her computer on or before 8:30 AM every day and in attendance of all team meetings, unless she had a legitimate excuse or emergency. | Janet’s average clock-in time in October was 8:20 AM, and to her manager’s knowledge, she attended all key meetings to which she was invited. | Janet really stepped up this last month and made an effort to be present and attentive in meetings and with her day-to-day assignments. |

**Overall Assessment**

Janet took this PIP in stride and committed to improvement this month. Her peers and manager were impressed with her upbeat attitude, her determination, her engagement, and her strong performance metrics this month.

**Action Items and Next Steps**

Due to Janet’s professional response to this plan and her over-attainment in all outlined areas, this organization is proud to say her employment status is no longer in jeopardy and she is removed from all restraints effective **November 1, 2022.** We’re proud of Janet’s work and look forward to continuing to work with her in this role and in her career.