

Appendix B: Team performance plan template

PERFORMANCE PLAN ACTION PLAN

EMPLOYEE NAME		ROLE / TITLE		EMPLOYEE ID	
SUPERVISOR		DEPARTMENT		DATE	

TEAM PURPOSE, ROLES, AND RESPONSIBILITIES

Provide specific team purpose, roles and responsibilities.

Individual/Team purpose

The sole purpose of the customer service team is to ensure that the customer's questions and issues are answered and solved, and the organisational objectives are met.

Roles and responsibilities

Customer service team leader – Michelle Wild

- Coordinate customer service team
- Provide direct customer support
- Review and resolve escalations
- Evaluate team performance and provide appropriate support or training
- Manage team effectiveness.
- Support process improvement

Customer Service representatives – Yuki, Charon, Fernando

- Maintaining a positive, empathetic and professional attitude toward customers at all times.
- Responding promptly to customer inquiries.
- Communicating with customers through various channels.
- Acknowledging and resolving customer complaints.
- Knowing products and services inside and out so that you can answer questions.
- Processing orders, forms, applications, and requests.
- Keeping records of customer interactions, transactions, comments and complaints.
- Communicating and coordinating with colleagues as necessary.
- Providing feedback on the efficiency of the customer service process.
- Ensure customer satisfaction and provide professional customer support.
- Resolve customer complaints via phone, e-mail, mail, or social media.

- Utilise computer technology to handle high call volumes.
- Work with the customer service manager to ensure proper customer service is being delivered.
- Handle changes in policies or renewals.

TEAM GOALS

Provide specific goals as they relate to strategic organisational objectives.

GOAL #	GOAL DESCRIPTION	ISSUE ADDRESSED BY MEETING GOAL
1	Achieve average customer satisfaction of 95% for customer enquiries	Customers will be happier which will reduce the amount of complaints and unhappy customers, which will make their day more enjoyable and productive.
2	Decrease average first reply time for e-mail support from 11 hours to 8 hours	Customers will be happier
3	The service call resolution rate to be improved from 80% to 90%	
4	The first contact resolution (FCR) rate to be improved by 10% by next month.	
5	Provide appropriate support and training to the customer service staff members to improve their skills or address any performance or other issues.	Customer satisfaction will increase and staff will be happier because of job satisfaction from achieving goals and less complaints and rude people.
6	To promote team member accountability for personal work and team tasks.	This is linked to an increase in commitment to work and employee moral, which leads to higher performance

EXPECTED OUTCOMES

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

EXPECTATION DESCRIPTION
Reach goals by 25/07/2022, including weekly increases of at least 2%

STRATEGIES

List activities/strategies that will aid to achieve the goals set above.

GOAL #	ACTIVITY	START DATE	PROJECTED DATE OF COMPLETION
	Meeting/brainstorming activity.	30/05/2022	30/05/2022
	Include team members in planning and decision making ie suggestion box, employee surveys	30/05/2022	4/6/2022
	Determine what training and support each team member needs	30/05/2022	4/6/2022

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
Management support	Mentoring
Online	Online training in customer service, time management, self improvement courses
Library	The company may have a library of learning materials

PROGRESS BENCHMARKS

GOAL #	ACTIVITY	DATE OF CHECK	FOLLOW-UP METHOD phone, email, mtg.	EXPECTED PROGRESS/KPIs	COMMENTS
	Meeting	31/05/2022		Plan of what is to be done by management and staff	
	Suggestion box	04/06/22	Meeting	Make a suggestions register and have a meeting to discuss ideas	
	Create a training schedule	04/06/2022	Meeting	Create a schedule of what training is being done and when	
	Report monthly on kpi's to show progress	30/06/2022	meeting		

TIMELINE FOR IMPROVEMENT, CONSEQUENCES, AND EXPECTATIONS

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

Staff are to meet with management weekly to go over the plan and make sure goals are being met.
 Meeting to be held monthly to review results
 If any staff are not meeting kpi's a personal performance improvement plan will be put in place

SIGNATURES

EMPLOYEE NAME	EMPLOYEE SIGNATURE	DATE

SUPERVISOR NAME	SUPERVISOR SIGNATURE	DATE

Appendix C: Individual performance improvement plan

INDIVIDUAL PERFORMANCE IMPROVEMENT PLAN: TEAM MEMBER 1

EMPLOYEE NAME	Yuki	ROLE / TITLE	Customer Service Representative	EMPLOYEE ID	
SUPERVISOR	Michelle Wild	DEPARTMENT	Customer Service	DATE	30/05/2022

IMPROVEMENT GOALS

Provide specific goals as they relate to areas of concern to be addressed and improved upon.

GOAL #	GOAL DESCRIPTION	ISSUE ADDRESSED BY MEETING GOAL
1	Increase Yuki's average customer satisfaction rating of 72% to 95%.	Meet strategic objective, Increase customer satisfaction Increase Yuki's confidence, moral and job satisfaction.

EXPECTATIONS

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

EXPECTATION DESCRIPTION
Average rating to improve by 4% each week

GOAL ACTIVITIES

List activities that will aid to achieve the improvement goals set above.

GOAL #	ACTIVITY	START DATE	PROJECTED DATE OF COMPLETION
	Shadow with a more experienced team member to learn from	31/05/2022	14/06/2022
	Have a manager sit with Yuki for one hour per day to observe and train	31/05/2022	21/06/2022
	Complete online training in Customer Service	02/06/2022	06/06/2022
	Have weekly meeting with manager to discuss improvement	06/06/2022	25/07/2022

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
Management support	Mentoring/shadowing
Online	Online training in customer service, time management, self improvement courses

PROGRESS MONITORING

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

FOLLOW-UP SCHEDULE

DATE SCHEDULED	ACTIVITY	CONDUCTED BY	DATE COMPLETED
14/06/2022	14-Day Review	Michelle	
30/06/2022	30-Day Review	Michelle	
25/07/2022	60-Day Review	Michelle	

PROGRESS BENCHMARKS

GOAL #	ACTIVITY	DATE OF CHECK	FOLLOW-UP METHOD phone, email, mtg.	EXPECTED PROGRESS/KPIs	COMMENTS
1	Meeting	06/06/2022	Mtg	4% increase	
	Meeting	14/06/2022	Mtg	4% increase	
	Meeting	28/06/2022	Mtg	4% increase	
	Meeting	25/07/2022	Mtg	95% reached	

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TIMELINE FOR IMPROVEMENT, CONSEQUENCES, AND EXPECTATIONS

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

Weekly improvements of 4% must be reached, and 95% goal reached by 25/07/2022.

SIGNATURES

EMPLOYEE NAME	EMPLOYEE SIGNATURE	DATE

SUPERVISOR NAME	SUPERVISOR SIGNATURE	DATE

INDIVIDUAL PERFORMANCE IMPROVEMENT PLAN: TEAM MEMBER 2

EMPLOYEE NAME	Fernando	ROLE / TITLE	Customer Service Representative	EMPLOYEE ID	
SUPERVISOR	Michelle Wild	DEPARTMENT	Customer Service	DATE	30/05/2022

IMPROVEMENT GOALS

Provide specific goals as they relate to areas of concern to be addressed and improved upon.

GOAL #	GOAL DESCRIPTION	ISSUE ADDRESSED BY MEETING GOAL
1	Increase Fernando's service call resolution rate from 65% to 90%.	Meet strategic objective, Increase customer satisfaction Increase Yuki's confidence, moral and job satisfaction.

EXPECTATIONS

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

EXPECTATION DESCRIPTION
Average rating to improve by 4% each week

GOAL ACTIVITIES

List activities that will aid to achieve the improvement goals set above.

GOAL #	ACTIVITY	START DATE	PROJECTED DATE OF COMPLETION
	Shadow with a more experienced team member to learn from	31/05/2022	14/06/2022
	Have a manager sit with Fernando for one hour per day to observe and train	31/05/2022	21/06/2022
	Complete online training in Customer Service	02/06/2022	06/06/2022
	Have weekly meeting with manager to discuss improvement	06/06/2022	25/07/2022

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
Management support	Mentoring/shadowing
Online	Online training in customer service, time management, self improvement courses

PROGRESS MONITORING

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

FOLLOW-UP SCHEDULE

DATE SCHEDULED	ACTIVITY	CONDUCTED BY	DATE COMPLETED
14/06/2022	14-Day Review	Michelle	
30/06/2022	30-Day Review	Michelle	
25/07/2022	60-Day Review	Michelle	
	90-Day Review		

PROGRESS BENCHMARKS

GOAL #	ACTIVITY	DATE OF CHECK	FOLLOW-UP METHOD phone, email, mtg.	EXPECTED PROGRESS/KPIs	COMMENTS
1	Meeting	06/06/2022	Mtg	4% increase	
	Meeting	14/06/2022	Mtg	4% increase	
	Meeting	28/06/2022	Mtg	4% increase	
	Meeting	25/07/2022	Mtg	90% reached	

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TIMELINE FOR IMPROVEMENT, CONSEQUENCES, AND EXPECTATIONS

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

Weekly improvements of 4% must be reached, and 9% goal reached by 25/07/2022.

SIGNATURES

EMPLOYEE NAME	EMPLOYEE SIGNATURE	DATE

SUPERVISOR NAME	SUPERVISOR SIGNATURE	DATE

Activity 3: Develop strategies and processes to facilitate team cohesion

Activity context

During the discussion with the team members, you came to know that the team members issues were never discussed before, and neither were they addressed. The team members told you that their inputs have never been valued and that has also led to change in their behaviours toward work and downfall in their performance.

You discovered that there had been no strategies, policies and procedures and processes to develop and facilitate team cohesion. You have discussed these matters with the Operations Manager. After the discussion, the Operations Manager has allocated you the task to develop strategies, policies and procedures and processes to improve and facilitate team cohesion.

The purpose of these strategies and processes is to:

- Facilitate team members input into planning, decision making and operational aspects of team tasks
- Promote team member accountability for personal work and team tasks
- Identify and address issues, concerns and problems identified by team members

Description of the activity

This activity requires you to develop strategies and processes to facilitate team cohesion. The strategies and processes must include the following:

- Two (2) strategies to facilitate team members input into planning, decision making and operational aspects of team tasks
- Policies and procedures to promote team member accountability for personal work and team tasks
- A process to identify issues, concerns and problems identified by team members
- A process to address the identified issue, concerns and problems

You must use the template provided to document your responses. You must ensure that the documented responses are concise to the point and within the specified word limit.

Template:

Two (2) strategies to facilitate team members input into planning, decision making and operational aspects of team tasks (30-50 words each)

Strategy 1: Suggestion Box

A suggestion box is a system for employees to give their suggestions and feedback. It can help to create employee commitment and satisfaction. Employees who don't have the confidence and may be hesitant to speak up are able to share their ideas. Make sure you check the suggestion box regularly so that you can make timely decisions, and to let employees know that you have received the suggestion and appreciate their input.

Strategy 2: Team member accountability

Accountability in the workplace means that all employees are responsible for their actions, behaviours, performance and decisions. It is linked to an increase in commitment to work and employee morale, which leads to higher performance.

Policies and procedures to promote team member accountability for personal work and team tasks (100-150 words)

Purpose and application of the policy – to make employees accountable for their own actions, behaviours, performance and decisions. To increase commitment to work and morale.

Procedures

- Complete tasks that have been assigned to you by the timeline you agreed on.
- Provide feedback – both managers and employees

- Deal with any issues as soon as possible so they don't become bigger problems.
- Make accountability a habit by including feedback and questions in every meeting.
- Assign action items during meetings and follow up to make sure action has been completed.
- Use RACI matrix accountability framework

A process to identify issues, concerns and problems identified by team members (30-50 words)

This can be included in regular meetings where employees are asked to tell concerns or problems that they have identified.

Some employees may not be comfortable with this so a suggestion box can be used, either a physical box, or an electronic system such as email.

They can tell their immediate supervisor who will then take the concerns to management.

A process to address the identified issues, concerns and problems identified by team members (50-100 words)

A register is to be kept of all issues and concerns identified by the employee. This is to be reviewed regularly by management and a decision made on what is to be done about it.

The register should include what is to be done, who is responsible for making the changes, when it is to be done by.

The employee who identified the issue or concern is to be notified of the outcome.

If any changes are to be implemented all staff must be notified, either by email, toolbox talk.

Meeting agenda template:

Date/Time:	25/07/2022		
Location:	Meeting Room		
Chairperson:	Michelle Wild		
Meeting Attendees: <i>Full names and roles</i>	Yuki, Charon, Fernando Customer Service Representatives		
Agenda Item/Topic	Discussion/Outcomes	Action Officer	Due Date
Welcome			
Performance Assessment Results	Goals from team performance plan		
Code of conduct	Code of conduct of the company		
Communication Topic?	Encourage employees to communicate with management if there are any personal issues affecting their work, or that they would like to talk to someone about.		
Summary	<u>Overall Summary</u> <u>Decision/s</u> <u>Action/s if any</u>		
Next Meeting time/date			
Meeting closed at:			

Minutes are a true and accurate record of the meeting	Approved/confirmed by whom?		
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Meeting minutes template:

Minutes of Meeting Meeting Objective: provide feedback, code of conduct, any further needs Attendees: Michelle, Yuki, Fernando, Charon Venue: Meeting Room Date: 25/07/2022 3pm			
No.	Points Discussed	Actions Suggested	Target Date
1	Goals from assessment: - Average customer satisfaction of 95% for customer enquiries was achieved. - The average first reply time for e-mail support was decreased from 11 hours to 8 hours - Service call resolution rate for all employees was improved from 80% to 90% - The first contact resolution (FCR) rate was improved by 10% and all employees reached the target of 90%. Reward – all staff are to be given a voucher to a local restaurant as a reward for reached goals.	Monitor monthly to ensure the targets are continually met	

2.	Code of conduct All employees are to act professionally at all times ??	Code of conduct to be reviewed by all employees	26/07/2022
3.	Communication – Michelle is available at any time if staff need to discuss any personal issues that are going on. Contact directly or by email if you would like to book a time.		
4.	Staff to continue using suggestion boxes for ideas for improvements, or any concerns		
Signature of attendee 1: Signature of attendee 2: Signature of attendee 3: Signature of attendee 4:			

Meeting agenda template:

Date/Time:	27/07/2022 3pm		
Location:	Meeting room		
Chairperson:	Michelle Wild		
Meeting Attendees: <i>Full names and roles</i>	Operations Manager		
Agenda Item/Topic	Discussion/Outcomes	Action Officer	Due Date
Welcome			
(Agenda item 1) <i>Topic?</i>			
(Agenda item 2) <i>Topic?</i>			
(Agenda item 3) <i>Topic?</i>			
Summary	<u>Overall Summary</u> <u>Decision/s</u> <u>Action/s if any</u>		
Next Meeting time/date			
Meeting closed at:			

Minutes are a true and accurate record of the meeting	Approved/confirmed by whom?		
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Meeting minutes template:

Minutes of Meeting			
Meeting Objective:			
Attendees:			
Venue:			
Date:			
No.	Points Discussed	Actions Suggested	Target Date
Signature of attendee 1:		Signature of attendee 2:	
Signature of attendee 3:		Signature of attendee 4:	

Template: Solutions implemented to address the unresolved issues, concerns and problems

Unresolved issues, concerns and problems	Actions implemented	Date implemented
Sign off:		
Date:		

Meeting agenda template:

Date/Time:	30/05/2022		
Location:	Meeting Room		
Chairperson:	Michelle Wild		
Meeting Attendees: <i>Full names and roles</i>	Fernando – Customer Service Representative		
Agenda Item/Topic	Discussion/Outcomes	Action Officer	Due Date
Welcome	Purpose of meeting is to discuss results of employee performance assessment		
Results that need improvement <i>Results</i>	Fernando has achieved a service call resolution rate is 65%. Goals to be achieved		
What training needs to be done to improve the results <i>Training</i>	What methods of training do we need to arrange? Formal Informal		
Create Individual Performance Plan <i>Performance Plan</i>			

Summary	<u>Overall Summary</u> <u>Decision/s</u> <u>Action/s if any</u>		
Next Meeting time/date	06/06/2022		
Meeting closed at:	3pm		
Minutes are a true and accurate record of the meeting	Approved/confirmed by whom?		

Meeting minutes template:**Minutes of Meeting**

Meeting Objective: to create a performance improvement plan so that Fernando can reach goals

Attendees: Michelle Wild, Yuki

Venue: Meeting Room

Date: 30/05/2022

No.	Points Discussed	Actions Suggested	Target Date
Results assessment of	Fernando has a service call resolution rate is 65%. The strategic customer satisfaction objectives are 90%.		25/07/2022
Training Required	Create a training schedule including: - Mentoring – shadow someone who is meeting the goals already, have manager work with Fernando for one hour each day to observe and give ideas. - Complete online customer service and time management training. - Have weekly meeting with manager to		Daily Weekly

	discuss improvement and what can be done next.		
Performance improvement plan	Created using input from Michelle and Fernando and agreed on		
Signature of attendee 1:			
Signature of attendee 2:			
Signature of attendee 3:			
Signature of attendee 4:			

Meeting agenda template:

Date/Time:	30/05/2022		
Location:	Meeting Room		
Chairperson:	Michelle Wild		
Meeting Attendees: <i>Full names and roles</i>	Yuki – Customer Service Representative		
Agenda Item/Topic	Discussion/Outcomes	Action Officer	Due Date
Welcome	Purpose of meeting is to discuss results of employee performance assessment		
Results that need improvement <i>Results</i>	Yuki has achieved an average customer satisfaction rating of 72%. Goals to be achieved		
What training needs to be done to improve the results <i>Training</i>	What methods of training do we need to arrange? Formal Informal		
Create Individual Performance Plan <i>Performance Plan</i>			

Summary	<u>Overall Summary</u> <u>Decision/s</u> <u>Action/s if any</u>		
Next Meeting time/date	06/06/2022		
Meeting closed at:	3pm		
Minutes are a true and accurate record of the meeting	Approved/confirmed by whom?		

Meeting Objective: to create a performance improvement plan so that Yuki can reach goals

Venue: Meeting Room

Date: 30/05/2022

No.	Points Discussed	Actions Suggested	Target Date
Results assessment of	Yuki has achieved an average customer satisfaction rating of 72%. The strategic customer satisfaction objectives are 95%.		30/07/2022
Training Required	Create a training schedule including: - Mentoring – shadow someone who is meeting the goals already, have manager work with Yuki for one hour each day to observe and give ideas. - Complete online customer service and time management training. - Have weekly meeting with manager to discuss improvement		Daily Weekly

	and what can be done next.		
Performance improvement plan	Created using input from Michelle and Yuki and agreed on		
Signature of attendee 1:			
Signature of attendee 2:			
Signature of attendee 3:			
Signature of attendee 4:			