

Omar Nazir
Customer Success Manager
Employer HR file

Date: 14 July 2026
Our Reference: FWWR/9BC837D2
Document Type: HR record

First Written Warning Record

1. CASE SUMMARY

This document outlines the circumstances, findings and subsequent actions relating to the issuance of a first written warning to Omar Nazir, the Customer Success Manager, following concerns regarding performance standards identified through audit and client feedback. The warning was issued on 14 July 2026, with a scheduled review date set accordingly.

2. BACKGROUND

On 18 March 2025, a formal hearing was conducted to review Omar Nazir's performance relating to his duties as Customer Success Manager. The review was prompted by issues identified in customer relationship management (CRM) documentation and internal deadline compliance, which had resulted in a linked client complaint concerning pallet allocation. Omar Nazir was invited to respond to the concerns raised during the hearing.

HR RECORD DETAILS

Employee
Omar Nazir

Role
Customer Success Manager

Case type
Issue First Written Warning

Reference
HRA-9BC837D2

KEY DATES

Completed
14 July 2026

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3. INFORMATION CONSIDERED

An audit revealed three instances where CRM notes were incomplete, alongside two occasions where internal deadlines were missed. One specific client complaint traced the origin of a missing pallet to incomplete handover details documented by Omar. During the hearing, Omar acknowledged some delays in his work but contested that these directly caused the pallet allocation issue.

These facts were examined in detail, noting the impact on client service and internal communications. No additional evidence was submitted at this stage, and the employer is advised to review any applicable source documentation thoroughly prior to finalising the case.

Omar's explanation and responses to the issues were taken into account in the overall assessment.

4. DECISION

After consideration of the facts and Omar Nazir's responses, the decision was made to issue a first written warning. This warning addresses the concerns about incomplete documentation and missed deadlines, recognising the need for improvement in these areas to support client satisfaction and operational efficiency.

The warning serves as a formal indication that the identified standards must be met consistently, with a clear expectation for performance improvement within a defined timescale.

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5. REASONS

The decision to issue a first written warning reflects identified shortfalls in completing CRM notes promptly and meeting internal deadlines, which have tangible repercussions on service delivery and client trust.

Specifically, inaccuracies and omissions in handover documentation contributed to a client complaint regarding pallet allocation.

While Omar Nazir acknowledges some delays, the employer's findings indicate these have affected operational processes. The warning aims to underscore the necessity for reliable and timely communication and task management as intrinsic to the Customer Success Manager role.

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6. FOLLOW-UP ACTIONS

Omar Nazir is required to complete a formal report-writing course within the next 6 weeks to enhance the quality and accuracy of his documentation.

He will participate in weekly 30-minute time-blocking coaching sessions with his manager to improve time management and deadline adherence.

Omar is expected to update the CRM system within 24 hours of any client contact to ensure all relevant information is accurately recorded.

A progress review will be scheduled 12 weeks from the date of this warning to assess improvement against agreed metrics.

Omar has the right to appeal this warning in writing to HR within 10 working days, stating his grounds for appeal.

Any appeal will be heard by a more senior manager not previously involved in this case, within 15 working days of the appeal being received, and Omar will have the opportunity to present evidence and call witnesses in support.

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7. AUDIT INFORMATION

Document Reference: HRA-9BC837D2

Employer: HRHeaven QA Sample Employer

Employee: Omar Nazir, Customer Success Manager

Date of Hearing: 18 March 2025

First Written Warning Issued: 14 July 2026

Review Due: 14 October 2026

All procedural steps have been conducted according to employer policy.

Employer should ensure all source documents and evidence are reviewed and retained with this record.

Employer bears responsibility for ensuring compliance with internal procedures and legal obligations, including consultation with specialist advisors where protected rights or dismissal risks may be engaged.