

Emily Turner

Date: 14 July 2026
Our Reference: PCL/OFF12026
Document Type: Letter

Dear Emily,

We are writing to formally outline a Performance Improvement Plan (PIP) concerning aspects of your role as a Customer Service Assistant at the Midlands community health centre evening and weekend clinic shifts.

Our goal with this plan is to support you in developing your skills to meet the expected standards within your current duties. We recognise your ongoing commitment and want to work together to achieve sustained improvement.

Your recent performance reviews have identified concerns regarding the quality of work, specifically relating to accuracy and autonomy when handling complex customer telephone enquiries and complaints.

These concerns include errors that have caused referral delays and incomplete patient records, as observed in specific instances such as the call on 12 February 2025, which resulted in a 48-hour referral delay, and a portal note on 3 June 2025 missing follow-up details for patient X.

Management has noted improvements in your written records following coaching, but there remains a tendency to avoid phone negotiation and inconsistent personnel notes.

You have acknowledged these issues and expressed an interest in clearer step-by-step scripts for difficult calls and additional supervised shadowing due to feelings of anxiety on unsupervised calls.

Performance Improvement Plan



LETTER DETAILS

Employee
Emily Turner

Role
Customer Service Assistant

Case type
Performance Improvement Plan

Reference
HRA-OFF12026



KEY DATES

Completed
14 July 2026

First review
08 August 2025

Final review
07 August 2025

Owner
Siobhan O'Connor, Retail Operations Manager



REVIEW CONTROL

Review dates, standards and measurements should remain clear, measurable and recorded in writing.

Area for Improvement	Required Standard	Measurement	Review Date
Quality of work	Improve accuracy and autonomy in handling complex customer telephone enquiries and complaints, reducing errors that cause referral delays and incomplete records.	Consistent correct resolution on 9 of 10 monitored complex calls and zero critical record errors over a 30-day final review period.	08 August 2025

Any changes to the facts, decisions, actions, evidence, responsibilities or review dates should be agreed in writing and recorded as an amendment to this document.

To support your development, the following Performance Improvement Plan will be put in place:

- **Objectives:** Improve accuracy and autonomy in handling complex telephone enquiries and complaints, aiming for a consistent correct resolution in 9 out of 10 monitored complex calls and zero critical record errors during a 30-day final review period.
- **Support:** You will receive targeted training including a half-day telephone negotiation workshop, role-play coaching with a senior clinician, and a refresher on portal recording procedures. Additionally, fortnightly check-ins and ad-hoc debriefs after difficult calls will be scheduled.
- **Adjustment Considerations:** An informal offer to reduce unsupervised complex calls and provide scripted prompts has been extended. Occupational health referral remains available if requested.
- **Measurement:** Progress will be assessed through monitored call evaluations, portal entry audits, signed competency checklists, and patient feedback for complex calls.
- **Policy Reference:** This plan aligns with the Riverside Customer Experience Standards and the Incident Reporting and Records Policy (version 2024).

Your first formal review of progress under this plan is scheduled for 8 August 2025, with the final review on 7 August 2025.

Throughout this period, Siobhan O'Connor, Retail Operations Manager, will oversee this process and will be your point of contact for questions or additional support.

It is important to understand that sustained performance improvement will be necessary to continue in your current role. Should the objectives not be met, consideration may be given to alternative roles within the organisation or termination of your fixed-term contract, following clinic policy.

You have the right to request a review with HR within 5 working days following the outcome notification of this PIP.

Please ensure you review this letter and the plan carefully.
Before issuing the final PIP documentation, the employer will verify that all relevant monitoring records and your signed acknowledgement are complete.

We encourage you to continue discussing any concerns or additional support needs as we progress through this period.

Siobhan O'Connor

Retail Operations Manager

Yours sincerely,

For and on behalf of HRHeaven QA Sample Employer

[Attachments: PIP support plan](#) | [Review schedule](#) | [Amendment log](#)