

Emily Turner
Customer Service Assistant
Employer HR file

Date:14 July 2026
Our Reference:PRS/0FF12026
Document Type:Checklist

PIP Review Schedule

1. EXECUTIVE SUMMARY

This checklist outlines the scheduled reviews and key activities to support Emily Turner, Customer Service Assistant, through her Performance Improvement Plan (PIP) focused on enhancing accuracy and autonomy in handling complex customer telephone enquiries and complaints.

The PIP objective is to achieve consistent correct resolution on 9 out of 10 monitored complex calls and zero critical record errors over a 30-day final review period, in line with Riverside Customer Experience Standards and the Incident Reporting and Records Policy (version 2024).

Support measures include training sessions, coaching, and fortnightly check-ins, all tailored for the Midlands community health centre evening and weekend clinic shifts.

This schedule also references monitoring of progress through call assessments, portal audits, and competency checklists, culminating in a final review by 7 August 2025.

Management and employee feedback have been taken into account, with acknowledgment from Emily regarding support needs and anxieties around unsupervised calls.

Attachments: PIP support plan | Review schedule | Amendment log

CHECKLIST DETAILS

Employee
Emily Turner

Role
Customer Service Assistant

Case type
Performance Improvement Plan

Reference
HRA-0FF12026

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.

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PIP Review Schedule

2. REVIEW SCHEDULE AND TASKS

- 1. Prepare and issue PIP formal letter to Emily Turner, including clear objectives, support plan, measurable success criteria, formal consequence wording and appeal route.
- 2. Conduct first formal PIP review meeting on 8 August 2025 to assess interim progress and address any barriers or additional support needs.
- 3. Monitor fortnightly performance through call logs, patient portal notes and coaching feedback; document observations and employee comments.
- 4. Provide telephone negotiation workshop (half-day), role-play coaching with senior clinician and refresher training on portal recording procedures.
- 5. Arrange additional supervised shift shadowing as requested by Emily to build confidence in handling complex calls.
- 6. Continue regular check-ins and ad-hoc debriefs after difficult calls to provide timely guidance and reassurance.
- 7. Compile evidence of improvement including monitored call assessments, portal entry audits, signed competency checklist and patient feedback for evaluation at final review.
- 8. Hold final PIP review meeting by 7 August 2025 to consider sustained performance improvement and potential role continuation or alternative arrangements.
- 9. Document outcome and provide Emily with final decision and next steps, including option to request HR review within 5 working days if desired.
- 10. Ensure that prior to issuing final PIP correspondence, HR confirms complete call monitoring records and receipt of Emily's signed acknowledgement.

Performance Improvement Plan

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.

Review Schedule

Review	Owner	Due Date	Evidence Required	Status
Initial review	Siobhan O'Connor, Retail Operations Manager	08 August 2025	Review notes	Scheduled
Final review	Siobhan O'Connor, Retail Operations Manager	07 August 2025	Outcome record	Pending

Follow-up Action Plan

Action	Owner	Due Date	Evidence Required	Status
Review the performance improvement plan letter and confirm it reflects the agreed facts.	Siobhan O'Connor, Retail Operations Manager	08 August 2025	Completion note or supporting evidence	Open
Review the pip review schedule and confirm it reflects the agreed facts.	Siobhan O'Connor, Retail Operations Manager	08 August 2025	Completion note or supporting evidence	Open
PIP Review Due is due on 06 August 2025.	Siobhan O'Connor, Retail Operations Manager	08 August 2025	Completion note or supporting evidence	Open
Add clear objectives and success measures before issuing a PIP.	Siobhan O'Connor, Retail Operations Manager	08 August 2025	Completion note or supporting evidence	Open
Review whether the PIP follow-up is overdue.	Siobhan O'Connor, Retail Operations Manager	08 August 2025	Completion note or supporting evidence	Open
Review the completed documents for factual accuracy before issue or filing.	Siobhan O'Connor, Retail Operations Manager	08 August 2025	Completion note or supporting evidence	Open

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

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PIP Review Schedule

3. OWNER AND PRIORITY

Siobhan O'Connor, Retail Operations Manager, is the designated owner responsible for overseeing PIP delivery, reviews, and evidence gathering.

Priority: High – This plan addresses performance concerns critical to service quality and compliance with clinic policy.

All actions should be aligned with Riverside Customer Experience Standards and the Incident Reporting and Records Policy (version 2024).

4. DUE DATES

PIP formal letter issuance: ASAP (prior to first review on 8 August 2025).

First PIP review meeting: 8 August 2025.

Ongoing fortnightly check-ins: every two weeks between PIP start and final review.

Telephone negotiation workshop and refresher training: scheduled prior to 31 July 2025.

Additional supervised shadowing shifts: arranged as soon as possible, per Emily's request.

Final PIP review meeting: 7 August 2025.

HR evidence check and documentation completeness: prior to final letter issuance post-final review.

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

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PIP Review Schedule

5. EVIDENCE REQUIRED

Monitored call assessments demonstrating accurate and autonomous handling of complex enquiries.

Patient portal entry audits showing completeness and correct follow-up details (reference: 3 June 2025 example).

Call logs referencing previous issues such as 12 February 2025 delayed referral.

Informal coaching emails and PIP meeting notes to confirm support and discussions.

Roster reports showing supervised shifts and shadowing hours completed.

Signed competency checklist confirming attainment of required skills and knowledge.

Documentation of patient feedback relating to complex call handling quality.

6. STATUS

Initial planning and document preparation complete as of 14 July 2026.

PIP officially created and review schedule established.

Support actions underway, including training arrangements and coaching sessions.

Reminder: PIP review due on 6 August 2025 is currently overdue; action required to ensure timely follow-up.

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

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PIP Review Schedule

7. COMPLETION NOTES

Ensure HR confirms full set of call monitoring records and signed employee acknowledgement before finalising any outcome correspondence.

Manager to verify all scheduled trainings and coaching have been delivered as planned.

Review empirical evidence for improvement consistent with PIP objectives prior to concluding process.

Maintain documentation in employee file with clear records of meetings, support offered and employee feedback.

Confirm any requests for occupational health referral are considered and accommodated as appropriate.

Note any employee requests for review with HR within the defined appeal window to uphold procedural fairness.

8. AMENDMENT LOG

14 July 2026 – Checklist created and initial scheduling completed by HRHeaven system draft.

Date of first and final PIP reviews set per management input and employee agreement.

Support measures and success criteria refined to reflect employee feedback and management observations.

Reminder notification added for overdue PIP review action.

Attachments: PIP support plan | Review schedule | Amendment log

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PIP Review Schedule

9. AMENDMENT CONTROL

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.

Appendix A - Amendment Log

Amendment Date	Section Updated	Previous Position	Updated Position	Approved By

Attachments: PIP support plan | Review schedule | Amendment log