

**☐ New Employee**

**☐ Improvement Plan**

**☐ Development Plan**

**☐ New Role**

Development Plan: is used to fast-track the knowledge and skills of a performing employee

Improvement Plan: is used to address performance problems

**Employee Information**

**Date :** [November 29, 2018]

**Name :** [Jacob H. Walker]

**Department :** [Sales and Marketing]

**Badge/ID No :** [063-64-XXXX]

**Date Hired :**  [July 20, 2018]

**Job Title :** [Sales Marketing Agent]

**Immediate Manager :** [Stephanie Cooper]

**Training Needs**

|  |  |  |  |
| --- | --- | --- | --- |
| **Training Goals** | **Training Objectives** | **Target Completion** | **Comments** |
| Improve communication skills to better connect with clients | * Finish a one-month training on client communications
* By the end of the program, there should be a significant improvement in employee assessment
 | 1 Month - From January 5 to February 5, 2019 | [Mr. Walker] has committed to the training willingly |
| Increase sales numbers by [12]% in the next month | * Learn to connect with clients better through a sales pitch.
 | End of the assessment period on February 28, 2019 | There is a slight improvement in handling sales as assessed by [Mr. Walker’s] immediate manager. |

**SWOT**

Internal - Within Employee’s Control | External - Outside Employee’s Control

|  |  |
| --- | --- |
| **INTERNAL** | **EXTERNAL** |
| **STRENGTHS**1. Open to learning
2. Good disposition and work attitude
 | **OPPORTUNITIES**The company allows re-training for employees who need to improve their performance. |
| **WEAKNESSES**1. Lack of communication skills
2. Lack of clients
 | **THREATS**New hires who can work better after training may have better opportunities for regularization. |

**Focus Knowledge and/or Skills**

|  |  |  |  |
| --- | --- | --- | --- |
| **Knowledge/Skill** | **S.M.A.R.T. Goals** | **Timeline** | **Feedback/Comments** |
| Improve sales skills | Get a [90]% grade on supervisor assessment after re-training course | January 31, 2019 | [Mr. Walker] passed the exam with a grade of [92]%. |
| Improve sales performance | Increase sales by [12]% in the next month | February 29, 2019 |  |

**Daily Activities**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Date Started** | **Date Ended** | **Accomplishments** | **Comments** |
| Practice a sales pitch with a training partner | January 5, 2019 | February 4, 2019 | Increased scores in the review |  |
| Generate $[500] in sales every day for one month | February 5, 2019 | March 4, 2019 |  | Ongoing |

**30-Day Action Plan**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Day** | **Date** | **Actions** | **Status** | **Accomplishments** |
| **1** |  |  |  |  |
| **2** |  |  |  |  |
| **3** |  |  |  |  |

**60-Day Action Plan**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Day** | **Date** | **Actions** | **Status** | **Accomplishments** |
| **1** |  |  |  |  |
| **2** |  |  |  |  |
| **3** |  |  |  |  |

**90-Day Action Plan**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Day** | **Date** | **Actions** | **Status** | **Accomplishments** |
| **1** |  |  |  |  |
| **2** |  |  |  |  |
| **3** |  |  |  |  |

**Training Activities/Programs**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Description** | **Date** | **Venue** | **Mentor/Speaker** | **No. of Hours** |
| High Impact Selling Seminar | January 10, 2019 | Conference Room B | Theresa Rosenbloom | 4 hours |
| Sales Prospecting and Coaching Seminar | January 20, 2019 | Conference Room D | Brenda Knapp | 4 hours |

**Employee Name and Signature:** [Jacob H. Walker]

**Date:** [March 5, 2019]

**Manager Name:** [Stephanie Cooper]

**Signature:**

**Date:** [March 5, 2019]