

# Training Plan Template

Date: 1 August 2019\_\_\_\_\_

Name: Joe Brown\_\_\_\_\_

Direct report: Mary Smith\_\_\_\_\_

Role: Customer service team supervisor\_\_\_\_\_

Role objective: To supervise the Sydney office customer service team and ensure customer inquiries, issues and complaints are dealt with and resolved in a timely and professional manner according to ABC Pty Ltd's standards.

Role requirements to be effective and meet expectations:	Proficiency score 1-6	Training Plan Details	
		What	When
1. Supervise, coach and manage the performance of 15 customer service officers to ensure efficient and effective performance	5	No training required at this time.	NA
2. Meeting service level requirements – issues and complaints resolved within 2 business days	4	No training required at this time. Continue to focus on service levels and performance.	NA
3. Provide daily, weekly and monthly reporting on complaints and resolution	2	Attend report writing course and internal refresh on reporting expectations and using the internal reporting tools and system.	Within 30 days and monitor weekly until addressed
4. Prioritise team resources effectively to deliver to standards	4	No training required at this time. Continually monitor.	NA
5. Communicate effectively with the maintenance and warranty department and finance department in an active and helpful way to provide seamless service to customers	2	Conduct focus group with your Direct Report with internal clients to access their expectation and perception of current communication and service. Review. Attend interpersonal communication skills course.	By November 2019
6.			

Proficiency score: 6 = Highly proficient; 5 = Proficient; 4= Moderately proficient; 3 = Below requirements; 2 = Poor; 1 = Non-existent

If the proficiency score is 3 or less for any role requirements then training should be considered.

Staff member \_\_\_\_\_

Date \_\_\_\_\_

Manager \_\_\_\_\_

Date \_\_\_\_\_

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