

Summary of Concerns and Expectations

TO: Employee's Name
FROM: Supervisor's Name
DATE: Date the memo will be discussed with the employee

This coaching memorandum is issued to document the following concerns and expectations for improvement being discussed in our meeting today. This memorandum is to reiterate the concerns that I have regarding:

1. Define and detail the **specific** issue associated with the performance and/or behavioral concern that the supervisor has observed.

Example: Your Quality of Service is below effective for the position of an IT Support Specialist. This week, I observed three phone calls that you received for IT services and overheard you being abrupt with the customers, which interfered with your ability to provide appropriate guidance to address their IT issue.

2. Define the **expectations**.

Example: In moving forward, I expect that you will properly provide each customer with the IT support needed in a supportive and courteous manner. You will take the time to clarify the issue and provide a solution that is appropriate.

3. **Support**. List out resources, additional training, and/or other tools that can assist the employee.

Example: Over the next two weeks, I will have you partner with a Sr. IT Customer Care Coordinator to provide you with tips and tools on how to properly service the customers.

4. List out the **defined timeframe** for the employee to meet the expectations and appropriate follow-up to provide feedback.

Example: Over the next month, we will meet on a biweekly basis to discuss progress, in an effort to ensure the expectations are being met.

5. **Closing (end on a positive note)**

Example: It is my desire that this coaching memorandum, which will be maintained in your departmental file, will result in improvement in your performance as listed above. Failure to meet the expectations outlined and discussed in this memorandum may result in further appropriate action.