

HOW TO USE THIS TEMPLATE

Share the agenda with the agent before the session so they can prepare. Complete each section during the conversation, ensuring the agent has time to contribute. Both parties should agree on new goals and sign off at the end. File a copy for reference at the next session.

AGENT NAME

SUPERVISOR

DATE

SESSION NUMBER

DURATION

Agenda

-
-
-
-

Performance Review

Recent metrics, call scores, and trends

What's Going Well

Development Areas

Goals from Last Session

GOAL	STATUS		
	ACHIEVED	IN PROGRESS	NOT STARTED
	ACHIEVED	IN PROGRESS	NOT STARTED
	ACHIEVED	IN PROGRESS	NOT STARTED

New Goals

GOAL	TARGET DATE	SUPPORT NEEDED

Agent Comments

Additional Notes

NEXT SESSION DATE

SUPERVISOR SIGNATURE

AGENT SIGNATURE