***//Instructions for using this template***

*This template is designed to simplify your final peer-review project by providing a partially completed version of the Remote Team Performance and Growth Plan. It includes the scenario, task descriptions, and a part of the content. The content uses first-person language (“I,” “we,” “our”) to match the tone of your final submission.*

*For each placeholder provided in the template, provide your responses. This will help you create a practical and realistic plan based on the project scenario.*

*Remember to remove these instruction lines before submitting your final document.*

*Begin adding your responses to complete the plan!*

# My Remote Team Performance and Growth Plan

This plan has been developed to lead a fully remote team on a high-impact project. The focus is on ensuring consistent results and accountability in a remote environment.

## Project summary

Our company’s key business priority is to improve customer retention by ensuring new customers have a smooth onboarding experience with our software.

My team’s goal is to increase new customer retention in the first 30 days from 65% to 80% by the end of Q4. We plan to achieve this by creating better support materials, such as onboarding content (e.g., emails, quick start guide, and FAQs) and tracking user behavior patterns. Currently, we receive an average of 100 documentation-related support tickets per month.

I’ve been chosen to lead this initiative, managing a seven-member team consisting of a Product Manager, User Experience Designer, Software Developers, Customer Success Specialist, Data Analyst, and a Technical Writer. All members work remotely from their preferred locations, such as home. The User Experience Designer and the Data Analyst are in a different time zone (4 hours ahead from the rest of us), requiring careful coordination for synchronous activities.

## Developing my plan, step by step

### Task 1: Setting clear goals

My first task is to set clear goals for the team as a whole and for the team members. In this plan, I’m focusing on two team members: the Data Analyst and the Technical Writer.

|  |  |  |
| --- | --- | --- |
| **Serial number** | **Goal type** | **Goal statement** |
| 1 | Business priority | *<Enter your response here>* |
| 2 | Team goal | *<Enter your response here>* |
| 3 | Individual goals (Add one goal for each role) | **Data Analyst**:  *<Enter your response here>*  **Technical Writer**:  *<Enter your response here>* |

### Task 2: Assigning responsibilities

My next step is to make sure that each task in this initiative has a clear owner. I will use the RACI matrix to assign responsibilities to the Data Analyst and the Technical Writer.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Serial number** | **Tasks** | **Responsible** | **Accountable** | **Consulted** | **Informed** |
| 1 (sample) | Map current customer onboarding journey | Data Analyst | Me (Manager) | Technical Writer | All Team Members |
| 2 | *<Enter a task that the Data Analyst has to perform and fill up the RACI matrix>* |  |  |  |  |
| 3 | *<Enter a task that the Technical Writer has to perform and fill up the RACI matrix>* |  |  |  |  |

### Task 3: Tracking progress

Now that I’ve set clear goals (Task 1) and assigned responsibilities (Task 2), my next step is making sure the team stays on track.

#### Activity 1: Key metrics

|  |  |  |
| --- | --- | --- |
| **Serial number** | **Metric** | **Target** |
| 1 (sample) | 30-day customer retention rate | Increase from 65% to 80% by the end of Q4 |
| 2 | *<Enter the key metric for the Data Analyst role here>* | *<Enter the target for the key metric here>* |
| 3 | *<Enter the key metric for the Technical Writer role here>* | *<Enter the target for the key metric here>* |

#### Activity 2: Visibility metrics

|  |  |
| --- | --- |
| **Serial number** | **Metric** |
| 1  (sample) | % of weekly reports that include top 3 customer drop-off points (Data Analyst) |
| 2 | *<Enter a visibility metric for the Technical Writer role here>* |

#### Activity 3: Check-ins, team norms, and tools

|  |  |
| --- | --- |
| **Serial number** | **Strategy** |
| 1 (sample) | Daily asynchronous check-ins (e.g., via Slack/MS Teams channel) where each team member shares top priority for the day and any blockers. |
| 2 | *<Enter a strategy/action plan to review progress against goals, discuss challenges, and align on the next steps>* |
| 3 | *<Enter a strategy/action plan to take care of any time zone difference issues>* |

#### Activity 4: Escalation path

|  |  |
| --- | --- |
| **Levels** | **Actions** |
| 1 | *<Add level 1 escalation path here>* |
| 2  (sample) | If no resolution within 2 hours, the team member escalates to the Product Manager |
| 3 | *<Add level 3 escalation path here>* |

### Task 4: Providing feedback

During our second weekly review meeting on April 25th, the team noticed that one of the email design tasks was marked as “done” in the progress tracker, but the actual draft files weren’t uploaded to the shared folder. This created confusion for the reviewer and led to a delay in the review process. To address this, I scheduled a one-on-one with the technical writer who owned the task. I used the SBI-R framework to convey feedback.

|  |  |  |
| --- | --- | --- |
| **Serial number** | **SBI-R** | **Response** |
| 1 | Situation | *<Enter your response here>* |
| 2 | Behavior | *<Enter your response here>* |
| 3 | Impact | *<Enter your response here>* |
| 4 | Response | *<Enter your response here>* |

### Task 5: Supporting learning and development

During the last sprint, I noticed three different types of learning needs in the team:

**Performance issue**: The Data Analyst’s weekly reports lacked clarity and often missed highlighting the top 3 drop-off points, which slowed down decision-making.

**New tool**: A new analytics tool was introduced for reporting.

**Collaboration challenge**: Because of time-zone differences, handovers between the Data Analyst and Technical Writer were sometimes unclear.

To address these gaps, I created a targeted learning and development plan.

|  |  |  |  |
| --- | --- | --- | --- |
| **Serial number** | **Trigger** | **Training need**  (Enter only one for each trigger) | **Training format**  (Live virtual workshops, peer demos, etc.) |
| 1 | Performance issue |  |  |
| 2 | New tool |  |  |
| 3 | Collaboration challenge |  |  |