

TRACK YOUR PROGRESS

Customer Advisor

Position	Reviewing M Manager	Date	Current position	Store	Name	PERSONAL DETAILS
	Reviewing Manager/ Line Manager		ition			DETAILS
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B&O CUSTOMER ADVISOR – TRACK YOUR PROGRESS

A. What have I done, and how have I done it?

SUMMARY	What have I done well in this category? (Evidence)	What do I need to work on/develop?
Customer Service		
Process		
Stock Management		
Merchandising		her considers
Profit Protection		
Department-specific duties		
Customer		
Self		
Team		
Business		



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Has all anniversary training been completed in the last 12 months?	Have all training objectives set at the last review meeting (or as a part of a "Mini-Tracker" review) been completed?	If yes, has this training been validated?	Have all of the learning modules that are relevant to the role and payscale been completed?	Learning and Training Completed	
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NO O

If the answer is "No" to the above questions, please investigate the reasons for non-completion and agree an action plan to resolve them.

Note down on the Learning Programme the key areas of learning that have been completed in the last 12 months, and discuss how this learning has been applied.

Development Planning

List here any training that has to be completed (including anniversary training), with target dates for their completion. Learning Module to be completed Resources/People to Help Target Date

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D. Succession Planning

Comple (Note:)	ete the following a you should take in	t the end of the	he review to aid suc business needs into	cession planning and consideration.)	career development by tick	ing the mos	st appropriate bo	ox for the individ	ual.
Improv	e performance in	current role			Remain in current role				
Move t	o another role	ASAP 🗆	6 months 🛚	1 year 🗆	Fast Track				
E.	Pay Progress	sion Steps							
To be	completed ONLY	if the collea	gue is working to	wards the next level (to be authorised by the li	ne manage	er).		
1,	Is the Colleague consistently demonstrating "What I need to do" and "How I need to do it" at the correct level?							YES	NO
2.	Has the colleague completed the Learning and Development Programme for their role, and had it validated?						YES	NO	
3.	Is the individual being paid the highest rate available for the role?						YES	NO	
•	have answered "Y sses to the next p	•	ons 1 and 2, and "No	o" to question 3, you m	nay recommend that the indi	ividual	Tick if next pa authorised	y step is to be	