



CUSTOMER ADVISOR – TRACK YOUR PROGRESS

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Customer Advisor

PERSONAL DETAILS	
Name	
Store	
Current position	
Date	
Reviewing Manager/ Line Manager	
Position	

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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		
Profit Protection		
Department-specific duties		
Customer		
Self		
Team		
Business		

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B. Learning and Training Completed

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

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.

C. 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

