

APPENDIX 2: Placement Year Learning Objectives – Progress Review 1 - EXAMPLE

This exercise should be carried out approximately 3 months after the date of setting your original learning objectives. You should complete parts 1 and 2 independently and then discuss this with your line manager. Your line manager should complete part 3 giving one tick per category. Part 4 should be completed by you after discussion with your manager. Both you and your manager need to sign the document.

Learning Categories	1. Learning Objectives Taken from Exercise 1	2. Evidence of progress to date What have you been doing?	3. Line Manager to complete (Tick as appropriate – one tick per category)		
			Does not meet expectations	Meets expectations	Exceeds expectations
Technical Skills	<ul style="list-style-type: none"> Improve SQL skills Improve XML skills Improve HTML and Java Script programming 	<ul style="list-style-type: none"> Working on incoming support tickets that are KRS related e.g. Blue Bay Learning SQL with Steve and completing weekly homework/tasks 			x
Working with Others	<ul style="list-style-type: none"> Daily communication with the team in Reno/India and departments such as Infrastructure and Implementation Daily communication with clients, prioritizing high net worth clients 	<ul style="list-style-type: none"> Daily support call/chat with India and constant communication with Indian colleagues Frequent communication via email to clients to keep them informed of the status of the case. Communicating with Ram on certain cases to gain a deeper understanding Asking advice from other people 			x
Self-Management	<ul style="list-style-type: none"> Prioritize urgent cases that require immediate attention Keep up to date on all cases To be proactive in picking up new cases 	<ul style="list-style-type: none"> Label the cases as critical or urgent and approach someone to look into it immediately if possible Raising urgent cases to Theo Assigning myself new cases and working on them, asking for help if needed 		x	
Commercial Awareness	<ul style="list-style-type: none"> To gain an understanding of what asset management is To gain an understanding of the tools and products we offer Understand the different roles in the company and what their responsibilities are 	<ul style="list-style-type: none"> Gaining an insight from colleagues Communicating with individuals in different teams 		x	
Personal and professional development	<ul style="list-style-type: none"> To encourage myself in terms of learning new skills and scouting out new opportunities Network with different people in the company Make improvements based on constructive criticism 	<ul style="list-style-type: none"> Tackling new cases Take on board the feedback given by my manager and reflect to see what I need to work on further. Listening carefully to instructions 			x

4. Use this space to record any action points arising from the review meeting and any new or amended goals that you will be taking forward for the next review period.

	Action points/goals
Technical Skills	<ul style="list-style-type: none"> • Improve SQL skills to an advanced level • Improve HTML and Java Script programming to an advanced level
Working with others	<ul style="list-style-type: none"> • Daily communication with the team in Reno/India and departments such as Infrastructure and Implementation
Self-management	<ul style="list-style-type: none"> • Attention to detail • Proof-reading documents
Commercial Awareness	<ul style="list-style-type: none"> • To gain an understanding of what asset management is • To gain an understanding of the tools and products we offer
Personal and professional development	<ul style="list-style-type: none"> • To encourage myself in terms of learning new skills and scoping out new opportunities • Take on board improvements

Agreed date for second review meeting:

Date	Student Name	Student signature	Supervisor signature