

Name of Representative:	Name of Supervisor:	
Representative Code:	Date:	Branch:
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 40%;"> <p>Please Tick One:</p> <p><input type="checkbox"/> Weekly Coaching</p> <p><input type="checkbox"/> Others : _____</p> </div> <div style="width: 55%;"> <p><input type="checkbox"/> BSC Weekly Coaching, BSC Grade: _____</p> </div> </div>		

### **Suggested Topics for Discussion**

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|--|---|--|
| <ul style="list-style-type: none"> <li>Sales Activity &amp; Result</li> <li>Weekly Business Report</li> <li>Prospecting Activities</li> <li>Attend Co/Br/Unit Meeting</li> </ul> | <ul style="list-style-type: none"> <li>Training &amp; Development</li> <li>CPD Hours</li> <li>Financial Planner/BSC</li> <li>Complaints/ Commendations</li> </ul> | <ul style="list-style-type: none"> <li>Joint Field Work</li> <li>Telephone Clinic</li> <li>Role-Play</li> <li>Quality of Business</li> </ul> |
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### **Suggested Agenda**

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| <ul style="list-style-type: none"> <li>➤ Review previous meeting notes</li> <li>➤ Review sales activities and gross revenue of past week vs target</li> <li>➤ What went well and what went not so well?</li> <li>➤ What issues / areas should we address?</li> </ul> | <ul style="list-style-type: none"> <li>➤ How and when should we address them (action plans)?</li> <li>➤ How to improve on overall sales advisory services with added focus in areas of infractions committed?</li> </ul> |
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Please elaborate:

### **Risk Management & Compliance Requirement (if applicable)**

Adviser's Signature/Date:

Supervisor's  
Signature/Date:

Date of Next Session:

**Important:** By signing off the above, Supervisor has declared that he/she has personally met and coached the Adviser, all information is final as discussed and agreed by both parties.