

# CITE UP MERCHANDISING PROCESSES

Standard Operating Procedures, 2-Week Performance Evaluation Framework & Training Sign-Off Manual

<b>Employee Name</b>		<b>Manager / Lead Name</b>	
<b>Job Title</b>	Merchandiser / Trainee	<b>Review Period</b>	2-Week Training Phase
<b>Business Unit / Area</b>	Trade Marketing & Research	<b>Evaluation Stage</b>	End of 2-Week Induction

## Manual Purpose & HR Compliance Instructions (2-Week Fast-Track Review):

This manual defines the structured operational standards expected of all Cite Up Merchandising team members. It functions simultaneously as a step-by-step training curriculum and a rapid 2-week induction evaluation instrument. Given our fast-track route assignment timeline, metrics have been normalized to fit a standard **10-day active training lifecycle** (within the 2-week window). Trainees are required to maintain a baseline performance rating of **Strong (Rating 3)** to exit training successfully. Once completed, signed, and dated, one copy should be retained by the employee and the original must be submitted directly to Human Resources immediately following the 2-week mark.

## SECTION 1: DAILY OPERATIONAL FIELD STANDARDS

**Trainer Field Guide:** Use these criteria during active store walk-throughs to assess technical competence, compliance, and field knowledge during the 2-week onboarding period.

### 1. Availability & Check-In

- **Non-availability for work:** Inform the designated Team Lead (TL) at least **2 hours** prior to the official shift start time.
- **Location Arrival:** Check-in immediately upon arrival at the 1st store location using the authorized mobile application timestamp and physically sign the supermarket's HSE/Visitor logbook.

### 2. First Location Walk-Through & Documenting Standards

- Thoroughly inspect and neaten all active stock points across the floor, including chillers and promotional displays.
- Compile an exact, comprehensive re-stock list before retrieving goods.
- Capture and upload structured "Before" photos to the Team Lead (where mandated by Client parameters).

### 3. Warehouse Retrieval & On-Shelf Rotation

- Liaise professionally with warehouse and store staff to locate and retrieve stock items.
- Maintain a running, written listing of out-of-stock and low stock items and alert the designated salesperson immediately.
- Verify all stock points to ensure no back-dated inventory is obscured. Systematically record dates of all retrieved items.
- Load transport trolleys or flatbeds safely, ensuring zero product damage and full compliance with safe lifting practices.

### 4. Inventory Replenishment & Expiry Threshold Protocols

- **Rotation & FIFO:** Always pack new or later dates to the back of the shelf. Pull older dates to the front. Move older items with more than 2 weeks to expiry into chillers to accelerate sale velocity.
- **Out of Stock / Low Stock Management:** Proactively identify out of stock or critical low stock situations on shelves, floor displays, and chillers. Track baseline counts and report details instantly to the Salesperson and Team Lead to prevent empty shelf spaces.
- **Close-Dated Goods Protocol:** Identify products within **10 days of expiry**. Immediately communicate product name, exact counts, and expiry dates to the Salesperson, Team Lead, Trade Assistant, and Customer. If close-dated products are actively received from the delivery/warehouse team, reject or immediately escalate the batch details to the Salesperson and Team Lead prior to shelf placement. If zero response is recorded, initiate a secondary follow-up alert.
- **Expired Goods Protocol:** All expired products must be pulled from active chillers and shelves two days before the expiry date. Move them securely to the designated back store area. Provide immediate field notifications to the Customer, Salesperson, Team Lead, and Trade Assistant. If expired products are actively received from the delivery/warehouse team, reject or immediately escalate the batch details to the Salesperson and Team Lead.
- **Banding & Promotional Bundles:** Execute product banding actions only upon receipt of formal validation from the salesperson. Affix required pricing signs or promo stickers to notify customers of the value pack.

### 5. Standard Housekeeping & Store Maintenance

- Keep shelves completely pristine, free from dirt, dust, structural debris, and soiled or torn backing paper.
- **Spill & Breakage Cleaning:** Conduct immediate cleaning and wiping of any product spills, leakages, or broken items discovered on the shelf, tracks, or display floors to prevent product damage or floor safety hazards.
- Physically clean, wipe, and dust all merchandise units prior to placing them on the display shelves.
- Ensure product pricing tags are correctly aligned and highly visible. Remove faded, torn, or historical Point of Purchase (POP) displays, and apply updated campaign materials where directed.
- Maintain, wipe, and clean structural fixtures including Racks, Chillers, Gondolas, and standalone Floor Displays. Dispose of all packing boxes safely and preserve back-stock spaces in a neat, organized state.

### 6. Final Walk-Through, Store Evaluation & Check-Out

- Complete a final verification of all floor locations and take high-resolution "After" validation photos.
- Submit all "After" photos via the app to the Team Lead before exit. Report store challenges, structural issues, or local competitor activity with photographic evidence.
- Safely store and lock all company assets (ladders, promotional kits, tools). Log out using the mobile timestamp application, physically sign out of the store's HSE log book, get client signature sheets verified, and proceed to the next route location.

## SECTION 2: SMART KEY PERFORMANCE OBJECTIVES & EVALUATION SCORECARD

### Rating Definition Framework:

**5 (Outstanding):** Objectives exceeded consistently during training. | **4 (Exceeds):** N/A for tight compliance tracking. | **3 (Strong):** Standard objectives fully met (Baseline for independent route readiness).

**2 (Developing):** Skill gaps identified, minor issues or delays. | **1 (Inconsistent):** Major compliance failures, unable to meet field standards.

OBJECTIVE 1: ATTENDANCE COMPLIANCE (REF: SCHEDULE VI)	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Tracks total volume of unexcused absences during the 10-day training cycle. High operational reliability is essential for route planning.</p>	<p> <input type="checkbox"/> 5 (0 Absences)                       <input type="checkbox"/> 4 (N/A)                       <input type="checkbox"/> 3 (0 Absences)                       <input type="checkbox"/> 2 (1 Absence)                       <input type="checkbox"/> 1 (&gt;1 Absence)                 </p> <p>Evaluator / Trainer Comments:</p>
OBJECTIVE 2: PUNCTUALITY & ROUTE START STANDARDS	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Enforces timely store route arrival to maximize shelf presence and account coverage. Target is zero unexcused lateness.</p>	<p> <input type="checkbox"/> 5 (0 Times Late)                       <input type="checkbox"/> 4 (N/A)                       <input type="checkbox"/> 3 (0 Times Late)                       <input type="checkbox"/> 2 (1 Time Late)                       <input type="checkbox"/> 1 (&gt;1 Time Late)                 </p> <p>Evaluator / Trainer Comments:</p>
OBJECTIVE 3: APP LOG-IN & VERIFICATION COMPLIANCE	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Mandatory usage of mobile application for store tracking. Requires Before/After images and verified physical entry into store visitor logs. Target: ≤ 1 exception across 10 days.</p>	<p> <input type="checkbox"/> 5 (0 Errors)                       <input type="checkbox"/> 4 (N/A)                       <input type="checkbox"/> 3 (1 Error)                       <input type="checkbox"/> 2 (2 Errors)                       <input type="checkbox"/> 1 (&gt;2 Errors)                 </p> <p>Evaluator / Trainer Comments:</p>
OBJECTIVE 4: CORE JOB KNOWLEDGE EXECUTION	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Accurate execution of the 6Ps framework, Out-of-Stock checks, strict 2-day pre-expiry pull protocol, and close-dated receipt handling. Target: ≤ 1 non-compliance item.</p>	<p> <input type="checkbox"/> 5 (0 Variance)                       <input type="checkbox"/> 4 (N/A)                       <input type="checkbox"/> 3 (1 Variance)                       <input type="checkbox"/> 2 (2 Variances)                       <input type="checkbox"/> 1 (&gt;2 Variances)                 </p> <p>Evaluator / Trainer Comments:</p>

OBJECTIVE 5: QUALITY OF WORK & HOUSEKEEPING CLEANLINESS	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Maintains pristine gondolas, display racks, and chillers. Ensures 100% dust-free presentation and prompt cleanup of spills, leaks, and glass/product breakages. Target: ≤ 1 incident.</p>	<div style="border: 1px dashed gray; padding: 5px; display: flex; justify-content: space-around;"> <span><input type="checkbox"/> 5 (0 Defects)</span> <span><input type="checkbox"/> 4 (N/A)</span> <span><input type="checkbox"/> 3 (1 Defect)</span> <span><input type="checkbox"/> 2 (2 Defects)</span> <span><input type="checkbox"/> 1 (&gt;2 Defects)</span> </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <p>Evaluator / Trainer Comments:</p> </div>

OBJECTIVE 6: PERSONAL APPEARANCE & CORPORATE CONDUCT	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Maintains full compliance with dress code and uniform requirements. Displays excellent grooming, hygiene, and a courteous, professional demeanor with all store stakeholders. Target: ≤ 1 incident.</p>	<div style="border: 1px dashed gray; padding: 5px; display: flex; justify-content: space-around;"> <span><input type="checkbox"/> 5 (Perfect)</span> <span><input type="checkbox"/> 4 (N/A)</span> <span><input type="checkbox"/> 3 (1 Deviation)</span> <span><input type="checkbox"/> 2 (2 Deviations)</span> <span><input type="checkbox"/> 1 (&gt;2 Deviations)</span> </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <p>Evaluator / Trainer Comments:</p> </div>

OBJECTIVE 7: REAL-TIME ESCALATIONS & TRADE COMMUNICATION	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Proactively flags store low-stock and out-of-stocks to salespeople. Provides immediate alerts regarding route alignment, close-dated delivery batches, or floor opportunities. Target: ≤ 1 communication gap.</p>	<div style="border: 1px dashed gray; padding: 5px; display: flex; justify-content: space-around;"> <span><input type="checkbox"/> 5 (Proactive)</span> <span><input type="checkbox"/> 4 (N/A)</span> <span><input type="checkbox"/> 3 (1 Gap)</span> <span><input type="checkbox"/> 2 (2 Gaps)</span> <span><input type="checkbox"/> 1 (&gt;2 Gaps)</span> </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <p>Evaluator / Trainer Comments:</p> </div>

OBJECTIVE 8: HEALTH & SAFETY GUIDELINES COMPLIANCE	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Strictly adheres to all safety policies. Demonstrates proper lifting postures, secure use of step ladders, safe transit of floor carts, and proper isolation/handling of sharp or broken items. Target: ≤ 1 warning.</p>	<div style="border: 1px dashed gray; padding: 5px; display: flex; justify-content: space-around;"> <span><input type="checkbox"/> 5 (0 Infractions)</span> <span><input type="checkbox"/> 4 (N/A)</span> <span><input type="checkbox"/> 3 (1 Infraction)</span> <span><input type="checkbox"/> 2 (2 Infractions)</span> <span><input type="checkbox"/> 1 (&gt;2 Infractions)</span> </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <p>Evaluator / Trainer Comments:</p> </div>

OBJECTIVE 9 & 10: DRIVE, INITIATIVE & TEAM COLLABORATION	PERFORMANCE RATING METRICS (10-DAY TRAINING SCOPE)
<p>Actively secures added shelf real estate and floor space. Shares tactical trade learnings with internal teams. Maintains a collaborative, supportive mindset with store employees and customers.</p>	<div style="border: 1px dashed gray; padding: 5px; display: flex; justify-content: space-around;"> <span><input type="checkbox"/> 5 (Exceptional)</span> <span><input type="checkbox"/> 4 (N/A)</span> <span><input type="checkbox"/> 3 (Consistent)</span> <span><input type="checkbox"/> 2 (Passive)</span> <span><input type="checkbox"/> 1 (Uncollaborative)</span> </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> <p>Evaluator / Trainer Comments:</p> </div>

## SECTION 3: TRAINER & HR FORMAL DECISION FRAMEWORK (TWO-WEEK WINDOW)

### HR Field Thresholds for Training Transition or Discontinuation:

- **Transition to Full Route:** Achieves a consistent rating of **Strong (3) or higher** across all metrics. Displays full operational autonomy.
- **Immediate Discontinuation of Training:** Trainee records an Inconsistent (1) or Developing (2) score on core compliance targets (e.g., more than 1 unexcused absence, 1 instance of lateness, or failure to flag low/out stock trends). Due to operational route timelines, training will be discontinued rather than extended.

### Official HR Action Status Decision:

- Option A: Successful Completion of 2-Week Training** – Authorize transition to unsupervised standalone route mapping.
- Option B: Discontinuation of Training & Route Release** – Immediate training release and operational contract termination due to failure to meet basic operational metrics during the 10-day active training window.

## SECTION 4: PERFORMANCE REVIEW & SIGN-OFF DOCUMENTATION

Full Evaluation Feedback Summary Notes:

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TRAINEE / COLLEAGUE SIGNATURE

\_\_\_\_\_  
DATE SIGNED

\_\_\_\_\_  
TRAINER / EVALUATOR SIGNATURE

\_\_\_\_\_  
DATE SIGNED

\_\_\_\_\_  
HUMAN RESOURCES LEAD APPROVAL

\_\_\_\_\_  
DATE SIGNED