mimansa
RESEARCH & ADVISORY

PLAYBOOK · BRING AGENTS INTO A TEAM

Role Review Card

Use one card for each role that changed. Fill it in with the manager and the rewards team.



ROLE

e.g. AR analyst

PEOPLE IN THIS ROLE

e.g. 6

01 · WHAT TASKS HAS THIS ROLE LOST TO THE AGENT?

02 · WHAT NEW TASKS HAS IT GAINED?

03 · WHICH TASKS STILL NEED A PERSON'S JUDGMENT?

04 · DOES THE GRADE STILL FIT THE WORK?

05 · DOES THE PAY STILL FIT THE MARKET?

06 · WHICH TASKS MUST JUNIORS KEEP, SO THEY STILL LEARN?

GRADE DECISION

◯ Keep grade ◯ Move up ◯ Move down ◯ Re-evaluate fully

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