

A light blue silhouette of a world map is centered in the middle section of the page, serving as a background for the main title.

Coaching to Behaviors That Will Improve Results

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Success TriangleSM



Goals

Qualitative – Behaviors

Quantitative – Numbers



Coaching

Gathering and Analyzing Data for the Observation

Refer to Monthly Results example on page 8



Observation

Pre-Positioning



Purpose of Session

- _____
- _____
- _____
- _____
- _____



Reasoning to Client/Member

- _____
- _____
- _____
- _____
- _____



Minimum Standards That Will Be Communicated to the Professional

- _____
- _____
- _____
- _____
- _____



Putting It All Together

Guidelines for Observation

Observational Feedback

1. Obtain the Employee's Perception

2. Provide Your Perception

REDR

3. Reach a Consensus on Feedback and Skill Building Needs

4. Reach a Consensus on How to Improve the Employee's Skills



Skill Building

What Skill Improvement	Plan for Improvement with Whom Involved	How Do We Know Success Was Achieved	By When

Follow-Up



Monthly Results:

	100%	100%	12%	2	3	4.5
	% Mini-FiNAPing	%Tele-Consulting	Appointments to Tele-Consulting Contacts	Closed Referrals	New Client /Members Needs Met	Average Needs Met Per Day
Branch 1						
April	103%	174%	11%	6	1.67	5.71
Cheri	112%	187%	16%	7	7	5.42
Eric	98%	116%	10%	2	4.5	4.81
Jen	113%	128%	12%	1	5	3
Mark	151%	56%	9%	2	6.4	5
Tracey	107%	115%	20%	0	2	5.65
Branch 2						
Chuck	103%	115%	14%	2	2	5.32
Kerry	162%	103%	12%	1	2.16	3.53
Nancy	96%	104%	15%	2	1.5	2.31
Ron	78%	140%	20%	4	2.4	2
Shelley	115%	80%	13%	2	3	5.19
Theresa	116%	263%	9%	1	3.66	4.87
Branch 3						
Jeff	107%	142%	14%	3	3.25	4.54
Jim	121%	128%	11%	5	3.9	5.08
Nikki	101%	115%	12%	1	3.33	3.3
Pam	108%	109%	15%	6	2.72	4.5
Phyllis	77%	120%	14%	0	1.33	2.58
Stacy	122%	109%	12%	2	2.8	3.56
Branch 4						
Ann	126%	154%	10%	1	4.44	8.16
Kelly	98%	200%	12%	1	2.4	5.25
Marcus	162%	98%	15%	0	4	3.15
Scott	111%	121%	16%	0	2.66	4.4
Sharon	136%	108%	14%	1	3.15	3.36
Stephanie	157%	216%	12%	3	2.87	4.4
Branch 5						
Desi	93%	136%	12%	0	2.53	7.33
Joel	146%	108%	15%	1	2.81	6.85
Judy	36%	52%	3%	2	1.5	3.18
Melissa	110%	216%	11%	2	4.55	5.67
Renee	153%	218%	19%	2	2.73	9.1
Robin	119%	174%	13%	1	3	5.89

