

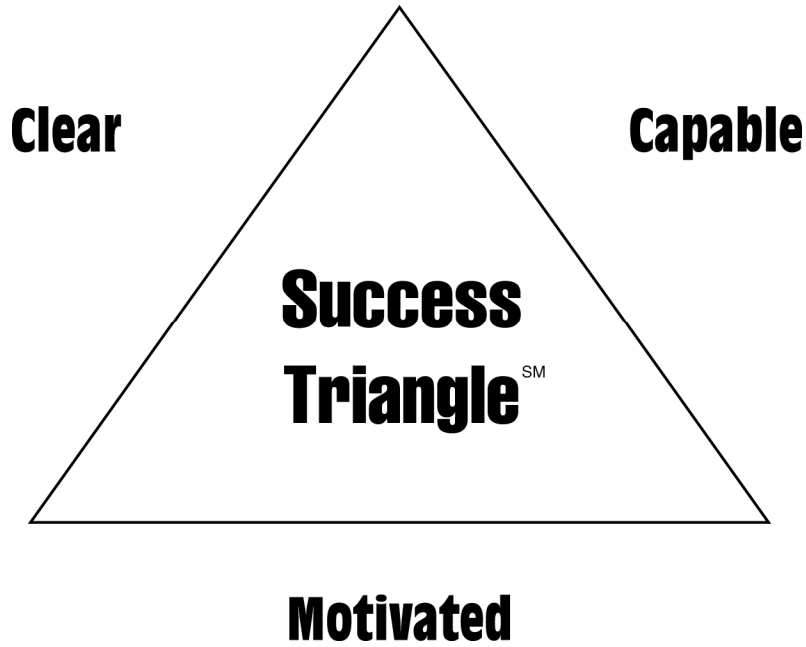
A light blue silhouette of a world map is centered in the middle section of the page, serving as a background for the title text.

Coaching Your Team to Success Worksheet

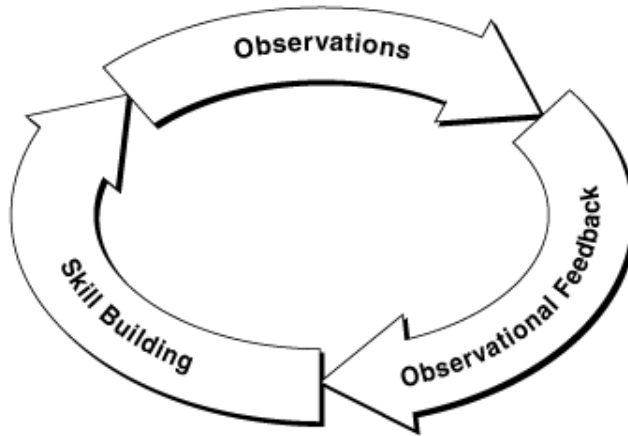
Draw Your Day Exercise

Descriptor	Out of Your Control (√)	In Your Control (√)

Outstanding, World-Standard Coach







Standards: 100% 100% 12% 2 3 4.5

	% Mini-FiNAPing	% Tele-Consulting	Appointments to Tele-Consulting Contacts	Closed Referrals	New Client/Member 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

Analyzing the Data

1. _____
2. _____
3. _____
4. _____
5. _____



Pre-Positioning

Script It – Bullet Point Each of the Points, Then PUT IT ALL TOGETHER

Purpose of Session

- ---
- ---
- ---
- ---
- ---

Reasoning to Client/Member

- ---
- ---
- ---
- ---
- ---



Minimum Standards That Will Be Communicated to Banker

- _____
- _____
- _____
- _____
- _____

Put It All Together

Conducting the Observation

Really pay attention to the microdetails of the observation so you can provide feedback for improvement.

There are four items to look for during an observation:

- 1. _____
- 2. _____
- 3. _____
- 4. _____

Positives and Proven Best Practices

Sins of Commission

Sins of Omission



Style

Observational Feedback

Be sure to offer feedback immediately following the observation. If you are not able to do it immediately, schedule a time to deliver your feedback.

There are four steps to providing Observational Feedback.

1. Obtain the employee's perception of their performance.

2. Provide your perception of what you observed.

3. Reach a consensus on feedback and skill-building needs.

4. Reach a consensus on how to improve the employee's skills.

Be sure to log the notes!!!!



Honesty in Coaching

Does not mean you have to be _____.

The goal is to build _____ and improve performance _____.

Most people appreciate candid, honest _____.

Skill Building

Skill to Be Mastered with Training and/or Technique Coaching	Method or Procedure of Coaching/ Who Is Responsible?	Desired Objective – How Do You Know Mastery Was Accomplished?

Follow-Up



What	How Much (How)	By When

