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Maximize Your Coaching: A Week in the Life of a Coach

Inspect What You Expect

Weekly Coaching Calendar

		Branch Manager	Regional	Retail Head	President
MONDAY	Sales Meeting	X	X[1]	X[1]	X[1]
	Debriefing	X			
TUESDAY WEDNESDAY THURSDAY	Briefing (a.m.)	X	X[2]	X[2]	X[2]
	Debriefing (p.m.)	X	X[2]	X[2]	X[2]
	Clinic	X[3]			
	Rounds (Sales)	X[3]			
	Rounds (FiNAP)	X[3]			
FRIDAY	Briefing (a.m.)	X			
	End-of-Week Debriefing	X[4]	X[4]	X[4]	X[4]
DAILY/WEEKLY	Track Results	X (Daily)	X (Weekly)	X (Weekly)	X (Weekly)
	Report Results	X	X (Summary)	X (Summary)	
	Coaching	X	X	X	X
	• Skill Development	X	X	X	
	• Recognition	X	X	X	X
	• Motivation	X	X	X	X
	Inspect What You Expect	X	X	X	X

[1] Sales Management Meeting (phone or in-person to inspect and drive actions), may be held other than Monday above the branch/unit level
[2] Brief or debrief direct reports three times per week in addition to the end-of-week debriefing
[3] Clinic or Round typically held once per week; additional sessions may be held by Team Leaders or others
[4] Plan for subsequent week and set goals based upon the week's results
Note: Does not include the manager's own sales responsibilities

Meetings

Meeting Coaching Tool

Date:	Location:
Facilitator:	Observer:
Topic:	

- ❑ Topic was clear, focused, and directly relevant to the level of participants and immediately actionable.
- ❑ Topic was announced prior to the meeting (i.e., Thursday or Friday).
- ❑ Participants and Facilitator came prepared with the five most powerful actions to achieve the desired outcome in writing.
- ❑ Successes were briefly recognized (i.e., 2–3 minutes).
- ❑ Current week's focus and goals were briefly discussed (i.e., 1–2 minutes).
- ❑ Facilitator provided rationale for Meeting topic.
- ❑ Conducted **Big Five Workshop** on the Meeting topic.
- ❑ Determined five powerful and focused actions that could be implemented immediately following the meeting.

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

- ❑ The meeting ended with commitments (What? How Much? and By When?) for each participant.
- ❑ The Facilitator recorded the commitments.
- ❑ The Facilitator made their own commitments.
- ❑ The Facilitator pre-positioned that they would be following up with each participant.
- ❑ The Facilitator checked for clarity before closing the meeting.
- ❑ The Facilitator closed the meeting on a positive note.

Big Five Workshop

As you are choosing topics, be sure that the topic:

1. Can be immediately implemented and acted upon

   ____________________ after your meeting.

2. The outcome of the meeting needs to be measured with What?

   How _______________? By When?

3. The topic needs to be very ________________________ so that

   action can be taken.

4. Be certain that the topic will generate personal ______________ that

   are directly relevant to the level of the participants.

What are the five most powerful actions you can personally take to ___________?

Your Brainstorming	Team Brainstorming	The Big Five
		1. 2. 3. 4. 5.

Sample Meetings

Increasing Relationship-Related Topics

- The Five Most Powerful Actions we can personally take to identify the opportunities for __________ (loans, deposits, specific products, etc.)

Service-Related Topics

- The Five Most Powerful Actions we can personally take to improve member satisfaction

Product Knowledge/Skill-Enhancement-Related Topics

- The Five Most Powerful Actions we can personally take to improve the team's conversational knowledge of specialized products (focusing on the benefits)

Other

- The Five Most Powerful Actions we can personally take to improve tickler systems and follow-up

Daily Briefings (Huddles)

Debriefings

Daily Debriefing Workshop

Looking at our Big Five, work as a group to come up with the most effective debriefing questions.

1	
2	
3	
4	
5	

Scriptwriting Clinic Tip Sheet

When conducting a Scriptwriting Clinic in person, divide groups into teams, each with a Leader, Spokesperson/Scribe, and Timekeeper.

Scriptwriting Clinics
Step 1: Brainstorm Bullet Points/Headlines
Use benefits over features. • Protect Health and Lifestyle • Save Money, Deliver Value • Superior Level of Care • Provide Convenience
Step 2: Reduce Headlines to Big Five and Rank
• The reduced answers can range from three to seven, but the target is five to keep the script brief and focused. • Assign a number to each answer to help prioritize the way in which information is presented.
Step 3: Develop Each Bullet Point/Headline
• Use the “Which Means/For Example” Technique to define precisely what you are offering. *“What I mean by (x) is…”* This statement is then followed with a specific example of how it worked for a client/member. • Use an Indirect Anti-Competition Comment to define precisely what you are offering. Differentiate yourself from your competitor by using the word *“Unlike”.* Use this technique only once during your script.
Step 4: Construct a First-Person Script
• Use the Litany Technique to list topics to be covered in numerical order.

Brainstorm Ideas

Reduce to the Big Five and Rank

Develop Each Bullet Point

1.

2.

3.

4.

5.

Construct a First-Person Script

Introduction: ____

____

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____

Core of Script: ____

____

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____

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____

Ask for the Business: ____

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____

Inspecting Plans

Planning is important in everything we do.

____

____

End of Day

Determine what you have ______________________ and what has to be done the next ___________________________.

Night Before

Allows _____________________________ in a quiet, less stressful time at home, away from all of the chaos and ___________________________ of the day. You can also ___________________-__________________ a plan that was developed before you left the office.

Weekends

Planning on Sunday evening when you are already thinking about

_____________________________.

Plan the Week, Not Just the Day

Block out the entire __________________. Fill in the _________________ later.

Plan the Month, Not Just the Week

Since you are already devoting time to planning, plan the entire _____________.

Hard vs. Easy Tasks

Do the ____________________ things first thing in the morning when you are

______________________ and plan to do the easy tasks at the end of the day.

What, How Much, By When?

____

____

____

____

Weak Versus Strong Commitments Workshop

	Weak Commitment	Stronger Commitment		
		What?	How Much?	By When?
1	Make calls			
2	Ask for referrals			
3	Review previous needs assessments			
4				
5				

Closing Rounds Tip Sheet

STEPS	WHAT	DETAILS
Before the Closing Rounds (1–2 days before)		
Step 1:	Create a Rounds Team of no more than 3–4 people.	
Step 2:	Schedule weekly Rounds for each team.	
Step 3:	Select a case presenter.	• Let the presenter know that they need to be prepared to present a Closing Rounds case to the team. • Rotate the case presenter weekly.
During the Closing Rounds (15–20 minutes)		
Step 1:	Previous case presenter updates team on results achieved from recommendations.	
Step 2:	Current week's presenter presents their Rounds case.	Provide the following information: • Intent (what the presenter is trying to achieve for the client/member). • Ethics behind the intent provided (why it's in the client's/member's best interest). • What the presenter already tried.
Step 3:	Rounds team obtains additional information.	• Ask questions to gain full understanding of the case.
Step 4:	Team members make recommendations for specific actions the case presenter can take to close the sale based on the information presented.	• The focus of the team is to determine additional steps to close the sale. • Presenter writes an Action Plan based on the team's recommendations.

More, Better, Different, Less

More	
Better	
Different	
Less (or not at all)	