

The Coach Skills Loop:

Observation, Observational Feedback and Skill Building



Outstanding, World-Standard Coaching

Success TriangleSM





Goals

Qualitative – Behaviors

Quantitative – Numbers

Gathering Data

Standards: 100% 100% 12% 2 4 5.25

	% Financial Reviews	% 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 Prior to the Observation

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



Workshop (Refer to Monthly Results Page 2)

Communicating an Observation to a Banker

Pre-Positioning



Purpose of Session

- _____
- _____
- _____
- _____
- _____



Reasoning to Client/Member

- _____
- _____
- _____
- _____



Minimum Standards to be Communicated to the Banker

- _____
- _____
- _____
- _____
- _____



Putting 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. Remember the REDR technique.

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!



Coach's Log

Coach's Log		Coach/Manager:		
Player:		Location:		
Date	Notes: (Key Actions, Observations, and Feedback)	Follow-up Actions/ Commitments	Follow-up Date	Status



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

What Skill Will Be Improved with Training and/or Technique Coaching?	Plan for Improvement (with Coach, Specialist or Peer?)	Desired Objective – How Do You Know Success Was Achieved?	By When

Follow-Up

