Outstanding, World-Standard Coaching

Success Triangle℠

- Clear
- Capable
- Motivated

Success
Goals

Qualitative – Behaviors

Quantitative – Numbers

Gathering Data

<table>
<thead>
<tr>
<th>Standards:</th>
<th>100%</th>
<th>100%</th>
<th>12%</th>
<th>2</th>
<th>4</th>
<th>5.25</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>% Financial Reviews</td>
<td>% Tele-Consulting</td>
<td>Appointments to Tele-Consulting Contacts</td>
<td>Closed Referrals</td>
<td>New Client/Member Needs Met</td>
<td>Average Needs Met Per Day</td>
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<td>Branch 1</td>
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<tr>
<td>April</td>
<td>103%</td>
<td>174%</td>
<td>11%</td>
<td>6</td>
<td>1.67</td>
<td>5.71</td>
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<tr>
<td>Cheri</td>
<td>112%</td>
<td>187%</td>
<td>16%</td>
<td>7</td>
<td>7</td>
<td>5.42</td>
</tr>
<tr>
<td>Eric</td>
<td>98%</td>
<td>116%</td>
<td>10%</td>
<td>2</td>
<td>4.5</td>
<td>4.81</td>
</tr>
<tr>
<td>Jen</td>
<td>113%</td>
<td>128%</td>
<td>12%</td>
<td>1</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>Mark</td>
<td>151%</td>
<td>56%</td>
<td>9%</td>
<td>2</td>
<td>6.4</td>
<td>5</td>
</tr>
<tr>
<td>Tracey</td>
<td>107%</td>
<td>115%</td>
<td>20%</td>
<td>0</td>
<td>2</td>
<td>5.65</td>
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</table>
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

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Putting It All Together

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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

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
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

<table>
<thead>
<tr>
<th>Date</th>
<th>Player:</th>
<th>Location:</th>
<th>Notes: (Key Actions, Observations, and Feedback)</th>
<th>Follow-up Actions/Commitments</th>
<th>Follow-up Date</th>
<th>Status</th>
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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

<table>
<thead>
<tr>
<th>What Skill Will Be Improved with Training and/or Technique Coaching?</th>
<th>Plan for Improvement (with Coach, Specialist or Peer?)</th>
<th>Desired Objective – How Do You Know Success Was Achieved?</th>
<th>By When</th>
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Follow-Up

_____________________________________________________________________
_____________________________________________________________________
_____________________________________________________________________
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