

# The Coach Skills Loop:

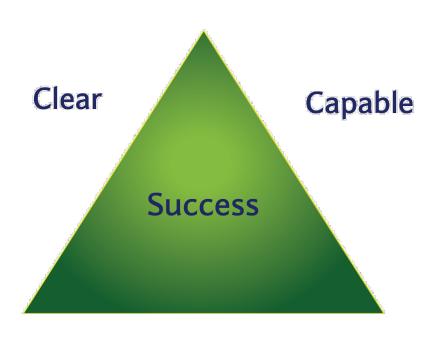
Observation, Observational Feedback and Skill Building



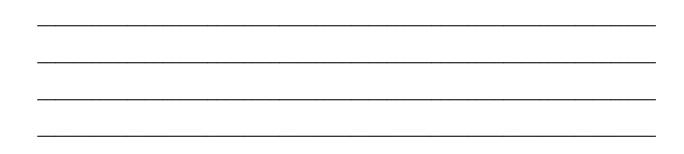
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Outstanding, World-Standard Coaching			

# Success Triangle<sup>SM</sup>



# **Motivated**



#### Goals

Qualitative – Behaviors			
	<del></del>	 	 
	<del></del>	 	 
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	
J	
· W	orkshop (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

Styl	le e
Ob	servational Feedback
	sure to offer feedback immediately following the observation. If you are not able to immediately, schedule a time to deliver your feedback.
The	re 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 s	sure to log the notes!

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### Coach's Log

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

Honesty in Coach	ing		
Does not mean you have	to be		
The goal is to build	and improve pe	erformance	
Most people appreciate c	andid, 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			