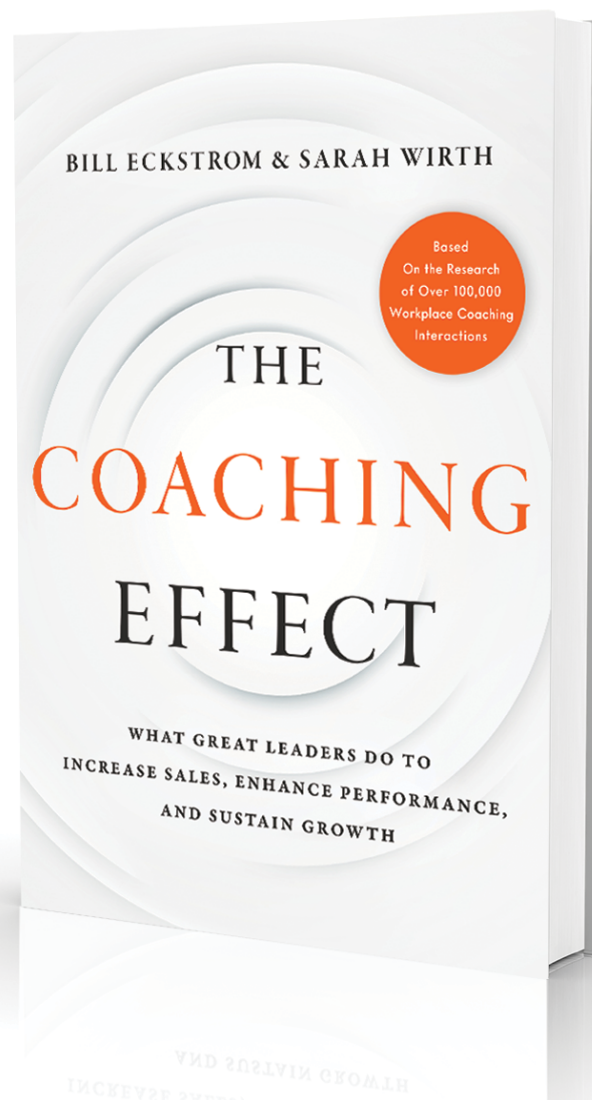


THE COACHING EFFECT

ACTIVITY TEMPLATES



BILL ECKSTROM
CEO

SARAH WIRTH
PRESIDENT

ONE-TO-ONE MEETING TEMPLATE



TEAM MEMBER:

DATE:

Personal updates

How was your weekend? How is your family doing? How is your home project coming along?

Progress on short-term work

What are your immediate priorities right now? What are the biggest obstacles in your way? What other tactics could you be trying?

Progress on long-term goals

Tell me about your progress on <insert long term goal(s)>. What are the specific steps you are taking? Have you considered <insert additional strategy or approach>?

How can I help?

Is there anything else I can be doing to support you? What would make things easier? Where do you need help right now?

Follow-up actions for next one-to-one meeting

What are your follow-up items from today's discussion? What follow-up do you have for me? What are the target dates?

TEAM MEETING TEMPLATE



TEAM MEMBER:

DATE:

Opening ice-breaker

What was the highlight of your weekend? What's a talent you have that nobody else knows about? What is your best personal achievement?

Team progress to goal

How are we progressing against our goals? How well is the company hitting its targets? What is the status of team projects?

Best practice sharing

Team members can tell a story, put together a presentation, play a game, do a role play, or do a group exercise in order to teach their peers a best practice idea, strategy or technique they've used to achieve success.

Challenges & questions

What are you wondering about today? What obstacles are people running into? Where could you use the team's advice? What is something you want to ask but haven't yet?

Coaches developmental topic

Manager can invite a guest speaker from inside or outside their company, or share an article, video, or an idea on any topic to help the team grow.

Team recognition

Cheers for Peers. Traveling Trophy.

CAREER DISCUSSION TEMPLATE



TEAM MEMBER:

DATE:

The purpose of this exercise is to get you thinking and owning your professional and personal development. The key to growth is not so much what you know now, but your ability to continually learn and adapt to the changing needs of our customers, our industry and our company.

Please think about and complete the following:

OVERALL GOALS AND NEEDS

What are your passions and motivations?

List your greatest talents and skills that should be utilized in your role.

What personal life goals do you wish to share?

Please explain the role you want me to play in helping you accomplish your goals.

CAREER DISCUSSION TEMPLATE



TEAM MEMBER:

DATE:

When you achieve your goals, how would you like to be recognized?

CURRENT ROLE GOALS AND NEEDS

What do you get paid to do?

What specifically would you like to accomplish this next year?

What skills do you need to further develop that would allow you to achieve your goal(s)?

CAREER DISCUSSION TEMPLATE



TEAM MEMBER:

DATE:

What professional skills would you like to enhance or learn?

Are there certain people or departments with whom you would like to work more closely?

POTENTIAL FUTURE ROLES

Do you have a passion or goal to teach or develop others?

What areas of interest should we consider as we watch your career develop?

As you see things today, what are your professional aspirations?

PERFORMANCE FEEDBACK FORM



TEAM MEMBER:

DATE:

5- Excellent

4 - Exceeds Expectations

3 - Meets Expectations

2 - Needs Improvement

1 - Unacceptable

Knowledge	Function	Questions to Consider	Rating	Notes
Products & Services	Product and service knowledge helps the team member identify and meet customer needs	Does the team member show extensive knowledge of all company products and services?		
Industry	Industry knowledge helps the team member plan in response to industry developments	Does the team member show a comprehensive knowledge of our industry?		

Meeting Skills	Function	Questions to Consider	Rating	Notes
Identifying Client Needs	Probing for needs ensures tailored products, benefits and presentations	Does the team member probe for needs, listen well, and ask appropriate follow up questions?		
Questions & Objections	Handling objections & questions well builds rapport & helps customers make decisions	Does the team member use ACT (acknowledge, clarify and transition) to deal with objections and questions?		
Next Steps	Having a next step at the meeting's end moves the process consistently forward	Does the team member propose a logical next step based on needs? Do they receive commitment?		

Overall Skills	Function	Questions to Consider	Rating	Notes
Planning	Planning helps the team member identify their strategic goals and daily priorities	Does the team member have strategic goals? Do they plan daily work in accordance with goals?		
Collaboration	Collaboration ensures the team member partners well with colleagues and communicates essential information	Does the team member get along well with peers? Do they communicate information colleagues need to know?		

GRAND TOTAL