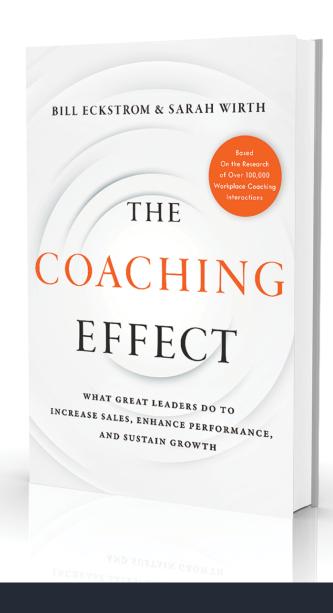
THE COACHING EFFECT

Ecsell

ACTIVITY TEMPLATES



ONE-TO-ONE MEETING TEMPLATE



TEAM MEMBER:		DATE:	
Personal updates			
How was your we	ekend? How is your family doing? How is your ho	me project comin	g along?
Progress on short	-term work		
What are your imposed to be trying could you be trying	mediate priorities right now? What are the bigges ig?	t obstacles in you	r way? What other tactics
Progress on long-	term goals		
Tell me about you considered <inser< td=""><td>r progress on <insert goal(s)="" long="" term="">. What ar t additional strategy or approach>?</insert></td><td>e the specific step</td><td>os you are taking? Have you</td></inser<>	r progress on <insert goal(s)="" long="" term="">. What ar t additional strategy or approach>?</insert>	e the specific step	os you are taking? Have you
How can I help?			
Is there anything right now?	else I can be doing to support you? What would n	nake things easier	? Where do you need help
Follow-up actions	for next one-to-one meeting		
What are your foll target dates?	ow-up items from today's discussion? What follow	w-up do you have	for me? What are the

TEAM MEETING TEMPLATE



TEAM MEMBER:		DATE:
Opening ice-breal	ker	
What was the high	nlight of your weekend? What's a talent you have ievement?	that nobody else knows about? What is your
Team progress to	goal	
How are we progr team projects?	ressing against our goals? How well is the compar	ny hitting its targets? What is the status of
Best practice shar	ing	
	an tell a story, put together a presentation, play a ir peers a best practice idea, strategy or techniqu	
Challenges & que	stions	
	ndering about today? What obstacles are people r vice? What is something you want to ask but have	
Coaches developr	mental topic	
	te a guest speaker from inside or outside their con elp the team grow.	mpany, or share an article, video, or an idea
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 The key to growth is not so much what you know now, but your abil changing needs of our customers, our industry and our company.	professional and personal development. lity to continually learn and adapt to the
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 accomp	plish your goals.

CAREER DISCUSSION TEMPLATE



TEAM MEMBER:		DATE:
When you achieve	e your goals, how would you like to be recognized	d?
CURRENT ROLE GO	ALS AND NEEDS	
What do you get p	paid to do?	
What specifically v	would you like to accomplish this next year?	
What skills do you	need to further develop that would allow you to	o achieve your goal(s)?

CAREER DISCUSSION TEMPLATE



TEAM MEMBER:		DATE:
What professiona	l skills would you like to enhance or learn?	
What professiona	i skills would you like to efficience of learn:	
Are there certain	people or departments with whom you would lik	ke to work more closely?
POTENTIAL FUTUR	E ROLES	
Do you have a pas	ssion or goal to teach or develop others?	
NATI : C' :		
What areas of inte	erest should we consider as we watch your caree	er 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
ldentifying 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