

Below is a sample “How To” complete a coaching sheet

ob·serve Identify what was observed. Make note of specific
Phrases, body language, use of skills, terms, transaction steps.

This information is to help create coach sheet and to recreate the specific moment to
make coaching more effective – it may not **all** be shared

praise Share everything good that was observed. Be specific...

Phrases, body language, use of skills, terms, transaction steps. Example: What a great
job leading the member conversation. When you heard the word wedding, you easily
transitioned into how we could help with wedding finances. You also did a great job of
waiting until you had uncovered the full member need before you offered solution.

coach Pick your battles. Identify one or two items that could make a
real difference. Keys that could help the employee improve skills, see
more success or correct procedure errors. Example: I noticed you did not discuss
disclosure prior to starting the application. Here’s why that is so important....

re·di·rect Share how you do it or how it might be done.

Example: Once I have uncovered all the member’s needs and just before I start the
Application, I usually say... This feels comfortable to me and it creates a nice transition
between our conversation and the start of the application. Let’s roll play it right now.

next step The delivery of disclosures prior to the application is nonnegotiable

So I will need you to start doing it right away. I will check in with you to see how it’s
Going and see if you need any more assistance in the next few days.

A coaching workshop will help to learn coaching
technique and more advanced coaching skills

Employee _____

Date _____

ob·serve

praise

coach

re·di·rect

next step

