

IMPROVED PERFORMANCE

Coaching Preparation Kit

Coaching Process

- Before**
- Schedule
 - Prepare
-

- During**
- Agree on agenda
 - Explore strengths
 - Explore opportunities
 - Agree on priorities and actions
 - Summarize
-

- After**
- Follow-up as agreed
 - Monitor progress
 - Reinforce and/or correct

Learning 2007 attendees: This is high-level process discussed in the Learning Story session. At the Huntington our approach is based on this process but is more detailed. For example, the steps that make up “Schedule” are

- 1. Schedule coaching appointment***
- 2. Schedule observation of behavior***
- 3. Schedule time to prepare for coaching session.”***

Coaching Process



Coach: _____ Direct Report: _____ Date: _____

| | |
|---|--|
| Sales Process Behaviors: | Use this space to make notes in preparation for during observation of sales process behaviors. |
| Before | |
| First Impression: <ul style="list-style-type: none"> <input type="checkbox"/> Have an organized workspace <input type="checkbox"/> Dress professionally <input type="checkbox"/> Have computer in ESS <input type="checkbox"/> Acknowledge customers as they enter | |
| During | |
| Greet the Customer: <ul style="list-style-type: none"> <input type="checkbox"/> Make eye contact, smile, and offer a handshake <input type="checkbox"/> Make a welcoming statement; e.g. "Thank you for coming in." <input type="checkbox"/> Make introductions and share HNB story <input type="checkbox"/> Use the customer's name immediately <input type="checkbox"/> Listen attentively, give undivided attention, and manage distractions in a positive manner <input type="checkbox"/> Greet anyone accompanying a customer and address any special needs; e.g. activity for children, beverage, etc. <input type="checkbox"/> Escort customer to your office and invite them to sit <input type="checkbox"/> Make a personal connection; show a genuine interest in getting to know the person; ask questions, explore common interests on a personal level <input type="checkbox"/> Maintain a pleasant tone and manner <input type="checkbox"/> Clarify the reason for the customer's visit <input type="checkbox"/> Provide an explanation of what to expect in response to the purpose of the visit <input type="checkbox"/> Confirm time commitment | |

Learning 2007 attendees: This is not the entire observation worksheet but instead is intended to offer an idea of the level of detail covered by our Sales Model and coached to during observation coaching.

Coaching Action Plan



Coach: _____ Direct Report: _____ Date: _____

Major Strengths:

What 2-3 activities or behaviors do you consider strengths?

- 1.
- 2.
- 3.

Improvement Opportunities:

What 1-2 activities or behaviors do you feel could be improved?

- 1.
- 2.

Priority Improvement Opportunity:

Which activity or behavior would you prioritize for action planning?

| Action Steps: | Who: | Target Date: | Progress: |
|--|------|--------------|-----------|
| <p><i>What steps will help to achieve desired performance?</i></p> | | | |