



THE COACHING EFFECT ACTIVITY RESOURCE WORKBOOK



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.

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?



CAREER DISCUSSION TEMPLATE

CURRENT ROLE GOALS AND NEEDS

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)?

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

Overall Skills	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?		
Overall 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				

25 WAYS TO DEVELOP A TEAM MEMBER



1. Have them take the lead on inter-departmental calls
2. Tap them to lead a pilot program for a new solution or idea
3. Encourage them to attend trade shows and events
4. Give them bigger accounts (internal or external) to serve
5. Assign them more important projects
6. Ensure they have exposure to senior management
7. Tap them to participate in an internal task force
8. Ask them to lead team meetings
9. Have them participate in continuing education and certifications
10. Allow them to organize and lead a development topic for a team meeting
11. Encourage to attend an outside training course on leadership
12. Have them sign up for a course on a specific skill they want to improve
13. Give them the opportunity to shadow someone in a different role
14. Have them listen in on difficult customer conversations to learn new skills
15. Ask them to be a mentor to other team members
16. Designate them as the team leader in your absence
17. Assign them a mentor from inside or outside your company
18. Have them provide gap coverage in another team member's absence
19. Ask them to present a new idea or strategy to the team
20. Tap them to present at an all company meeting
21. Have them lead best practice sharing at a team meeting
22. Ask them to partner with another department on new internal processes
23. Assign them to define a new process for your team
24. Have them become an expert on an internal process, service or product
25. Ask them to educate others on your team on an important skill

ICE BREAKERS FOR TEAM MEETINGS



1. What's top on your bucket list?
2. What was cool when you were a kid that is no longer cool?
3. If you were running for office, what would your main platform be?
4. Do you believe aliens exist? Why or why not?
5. Did you have a favorite pet growing up?
6. Do you prefer mountains, beaches, or cities?
7. Have you ever had a nickname? If so, what is/was it?
8. Do you have a hidden talent or one that you don't share with people often?
9. If each human came with a warning label, what would yours say?
10. What's the best movie/show/book/podcast you read/watched/heard this month?
11. What animal would you say most closely resembles your personality?
12. If you had to have a visible tattoo on your forehead, what would it be?
13. If you could only eat one food for the rest of your life, what would you eat?
14. If you had to delete all but 3 apps from your phone, which three would you keep?
15. What year would you time-travel to, if it were possible?
16. What show on Netflix did you binge watch embarrassingly fast?
17. If you had to change your name, what would your new name be and why?
18. What is your most treasured material possession?
19. What would the title of your memoir be?
20. Who is your hero and why?
21. Who was your favorite teacher in school and how did they impact you?
22. What is your earliest childhood memory?
23. Which holiday do you love to celebrate the most?
24. What is one important skill that you think every person should have?
25. What is your biggest pet peeve?

FOCUSED QUESTION EXERCISE



TEAM MEMBER:

DATE:

In this exercise, we will work together in small groups to enhance our understanding of a "5-alarm Fire" concept by formulating precise and insightful questions. These questions should encourage deeper inquiry and contribute to our collective knowledge of the topic.

INSTRUCTIONS:

Form Groups: Organize yourselves into groups of 2 or 3 individuals.

Topic Exploration: As the leader, your first task is to reflect on what you already know about the concept of a "5-alarm Fire." Consider any prior knowledge, experiences, or insights you may have on this subject.

Question Generation: Now, as a group, collaborate to create focused questions. These questions should adhere to the following characteristics:

- **Precise:** Ensure that your questions are clear and specific.
- **Relevant:** Ask for valuable information directly related to the topic.
- **Actionable:** Formulate questions that can be answered with meaningful information.
- **Encourage Inquiry:** Create questions that stimulate curiosity and may lead to further research.

Examples of Focused Questions: Refer to the provided examples of focused questions to guide your group in crafting practical inquiries.

- *What do you think it would look like if we were genuinely being customer-centric?*
- *How do you measure it?*
- *What barriers are in your way?*

Discussion: Engage in a conversation within your group to refine and finalize your questions. Ensure that each question meets the criteria listed above.

Reporting Out: After your group discussion, we will reconvene, and each group will present their most compelling focused questions to the larger group. This will encourage knowledge sharing and stimulate insightful discussions.

"Nowhere do we disguise, distort, and deflect our true feelings more than when giving and getting feedback."

Smart Brevity



DRIVEN BY DATA. POWERED BY PEOPLE.

