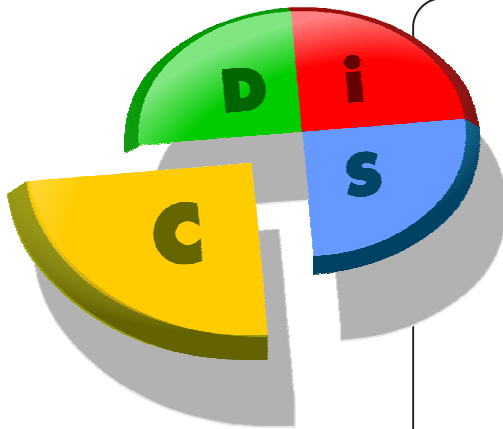


PERFORMANCE⁴ and Your Role as a Coach

OBSERVER INFORMATION

Case Study 1: Cynthia Edward



Cynthia's DiSC[®] Style: C

- Emphasis:** Working within **circumstances** to ensure quality and accuracy
- Tendencies:** Attention to standards and details, analytical thinking
- Motivated by:** Clearly defined performance expectations, quality and accuracy being valued
- Fear:** Criticism of **their** work, **slipshod** methods
- Traits:** Precision, diplomacy, analysis, skepticism, and introversion
- Limitations:** Overly critical of self and others, indecision because of the desire to collect and analyze data

Most Recent Coaching Conversation

As a former nurse, Cynthia's clinical knowledge is an area of strength for her. Cynthia is a new **Representative** (3 months experience) hired through the APSR program. After the last field visit, Linda coached Cynthia on how to leverage her clinical knowledge with patients.

If adequate progress is made on this skill in this call, the Coach may choose to quickly bring closure to the previous conversation and introduce new skills as the focus. Conversely, the Coach may choose to continue discussing this skill if it is deemed the most significant developmental opportunity demonstrated.

Linda has not required Cynthia to use the Continuous Call Plan taught in PERFORMANCE⁴ training.

Directions:

1. Review the information above.
2. Watch the three sales-call videos along with the participants.
3. Notice how **Jessica's** performance aligns with the skill ratings on **Page 5** of this handout.
4. After watching the three sales calls, you will observe a participant playing the role of Linda coach another participant playing the role of Cynthia. Note the Coach's performance on the Coaching Evaluation Form, **Page 4**.
5. After the role-play, explain your ratings to the Coach.

Linda Coaches Cynthia: Evaluation Form

O.F.T.E.N.	
The Coach's Opening established an appropriate tone for the discussion.	Strongly Disagree ----- Strongly Agree
The Coach stated a clear Focus.	Strongly Disagree ----- Strongly Agree
The Coach Transitioned with clear, behavior-related examples.	Strongly Disagree ----- Strongly Agree
The Coach Executed Coaching that will help improve behavior.	Strongly Disagree ----- Strongly Agree
The Coach Executed Coaching using the appropriate coaching approach for each task (Directive, Participative, Empowering). <i>See Evaluation Tips, next page.</i>	Strongly Disagree ----- Strongly Agree
The Next Steps are clear, specific, and measurable.	Strongly Disagree ----- Strongly Agree
PERFORMANCE⁴	
The Coach created a Continuous Conversation by referring to a previous coaching discussion.	Strongly Disagree ----- Strongly Agree
The Coach Connected the Dots by accurately Assessing Cynthia's performance of the Performance ⁴ selling skills.	Strongly Disagree ----- Strongly Agree
The coaching strategies used were Adapted to Cynthia's DiSC [®] style. <i>See Evaluation Tips, next page.</i>	Strongly Disagree ----- Strongly Agree
The Coach Adapted the Next Steps to Cynthia's DiSC [®] style. <i>See Evaluation Tips, next page.</i>	Strongly Disagree ----- Strongly Agree

Linda Coaches Cynthia: Evaluation Tips

Coaching Skill: The Coach Executed Coaching using the appropriate coaching approach for each task (Directive, Participative, Empowering).

Directive: Explain, focus, structure, and clarify.

Participative: Explore, discuss, negotiate, and collaborate.

Empowering: Extol, listen, follow up, and delegate.

Selling Skill	Skill Rating (DN, A, E, FE)	Coaching Approach (Directive, Participative, Empowering)
Strategic Planning	The videos do not provide enough information about Cynthia's use of this skill for it to be the focus of the coaching conversation.	
Pre-Call Planning	DN	Directive
Opening	DN	Directive
Investigating	DN	Directive
Listening	DN	Directive
Addressing Needs	DN	Directive
Handling Objections	DN	Directive
Close/Gaining Commitment	DN	Directive
Transitioning	The videos do not provide enough information about Cynthia's use of these skills for them to be the focus of the coaching conversation	
Post-Call Analysis		
Follow-Up		

Coaching Skill: The coaching strategies used were Adapted to Cynthia's DiSC® style.

Coaching Plus DiSC®: Strategies for a C		
Development Needed Directive Approach: Explain how to do it.	Achieves Participative Approach: Explore what they have been doing and possible methods of improvement.	Exceeds and Far Exceeds Empowering Approach: Extol a job well done.
<ul style="list-style-type: none"> • Explain using specific, factual statements of what level of performance is required. • Check for understanding and acceptance of information. • Provide time to process the information and practice the skill. setting a time limit for achievement of the desired performance results. 	<ul style="list-style-type: none"> • State the needed change, explaining why the change is necessary. Explore their thoughts about the solution. • Reduce potential defensiveness by acknowledging areas of competence and create opportunities for them to be an expert. • Provide time to think about the solution before committing to a specific course of action. • Explore techniques for solving problems requiring quick responses. 	<ul style="list-style-type: none"> • Extol a job well done. • Provide logical, accurate, precise descriptions of performance expectations including standards for quality. • Explain why the assignment needs to be done in terms of its importance to the overall operation. • Define clearly the limits of authority and responsibility, as well as the degree of personal risk involved.

Coaching Skill: The coach Adapted the Next Steps to Cynthia's DiSC® style.

Next Steps for a C should be clear, precise, and focused. The coach should communicate standards. The coach may need to allow Cynthia time to process the instructions. “Do x by Friday at 2:00. What I’ll be looking for is z. Check in with me on Wednesday so I’ll know you are on track.”)

Case Study 2: Jared Davis

Jared Davis
Representative



Jared's DiSC® Style: D

Emphasis: Shaping the environment by overcoming opposition and challenge

Tendencies: Getting immediate results, taking action, accepting challenges

Motivated by: Challenge, power and authority, direct answers

Fear: Loss of control in their environment, being taken advantage of

Traits: Self-confident, direct, decisive, risk-taker

Limitations: Impatient

Previous Coaching Conversation

After the last field visit, Linda coached Jared on Transitioning (DN) and using Marketing Tools (DN).

As a D, Jared has a tendency to be direct and impatient. In the previous field observation, Jared often “absent-mindedly” by-passed transitions because he was so focused on moving to his next agenda item. Likewise, he did not use sales tools because he felt that pausing his conversation with the customer in order to locate and explain a marketing tool often resulted in losing his customer’s attention.

If adequate progress is made on the skills in this call, the Coach may choose to quickly bring closure to the previous coaching discussion and introduce new skills as the focus. Conversely, the Coach may choose to continue to discuss these skills if these areas are deemed the most significant developmental opportunities demonstrated.

Jared did not submit Continuous Call Plans for this field observation.

Directions

1. Review the information above.
2. Watch the three sales-call videos along with the participants.
3. Notice how Jared’s performance aligns with the skill ratings on Page 5 of this handout.
4. After watching the three sales calls, you will observe a participant playing the role of Linda coach another participant playing the role of Jared. Note the Coach’s performance on the Coaching Evaluation Form, Page 4.
5. After the role-play, explain your ratings to the Coach.

Linda Coaches Jared: Evaluation Form

O.F.T.E.N.	
The Coach's Opening established an appropriate tone for the discussion.	Strongly Disagree ----- Strongly Agree
The Coach stated a clear Focus.	Strongly Disagree ----- Strongly Agree
The Coach Transitioned with clear, behavior-related examples.	Strongly Disagree ----- Strongly Agree
The Coach Executed Coaching that will help improve behavior.	Strongly Disagree ----- Strongly Agree
The Coach Executed Coaching using the appropriate coaching approach for each task (Directive, Participative, Empowering). See Evaluation Tips, next page.	Strongly Disagree ----- Strongly Agree
The Next Steps are clear, specific, and measurable.	Strongly Disagree ----- Strongly Agree
PERFORMANCE ⁴	
The Coach created a Continuous Conversation by referring to a previous coaching discussion.	Strongly Disagree ----- Strongly Agree
The Coach Connected the Dots by accurately Assessing Jared's performance of the Performance ⁴ selling skills.	Strongly Disagree ----- Strongly Agree
The coaching strategies used were Adapted to Jared's DiSC [®] style. See Evaluation Tips, next page.	Strongly Disagree ----- Strongly Agree
The Coach Adapted the Next Steps to Jared's DiSC [®] style. See Evaluation Tips, next page.	Strongly Disagree ----- Strongly Agree

Linda Coaches Jared: Evaluation Tips

Coaching Skill: The Coach Executed Coaching using the appropriate coaching approach for each task (Directive, Participative, Empowering).

Directive: Explain, focus, structure, and clarify.

Participative: Explore, discuss, negotiate, and collaborate.

Empowering: Extol, listen, follow up, and delegate.

Selling Skill	Skill Rating (DN, A, E, FE)	Coaching Approach (Directive, Participative, Empowering)
Strategic Planning	The videos do not provide enough information about Jared's use of this skill for it to be the focus of the coaching conversation.	
Pre-Call Planning	DN	Directive
Opening	DN	Directive
Investigating	DN	Participative
Listening	A	Participative
Addressing Needs	A	Participative
Handling Objections	DN	Directive
Close/Gaining Commitment	A	Participative
Transitioning	DN	Directive
Post-Call Analysis	The videos do not provide enough information about Jared's use of these skills for them to be the focus of the coaching conversation	
Follow-Up		

Coaching Skill: The coaching strategies used were Adapted to Jared's DiSC® style.

Coaching Plus DiSC®: Strategies for a D		
Development Needed Directive Approach: Explain how to do it.	Achieves Participative Approach: Explore what they have been doing and possible methods of improvement.	Exceeds and Far Exceeds Empowering Approach: Extol a job well done.
<ul style="list-style-type: none"> Explain and show them the simplest, quickest, and most practical way to become productive. Be firm and direct in stating the desired performance results. Define clearly the limits of their authority. 	<ul style="list-style-type: none"> Explore options for how they achieve the desired performance results. Use brief, direct statements complimenting their achievements, results, and leadership abilities. Provide challenges and opportunities to work independently and "win." Focus on skills for handling complex problems and gathering information about consequences before making decisions. 	<ul style="list-style-type: none"> Extol a job well done. Tell them what results you need, by when, and let them determine how to get it done. Specify clearly their limits or authority and available resources, allowing autonomy within those limits. Allow them to direct the efforts of others.

Coaching Skill: The coach Adapted the Next Steps to Jared's DiSC® style.

Next Steps for a D should allow autonomy and control. Any limits to authority should be specified.  "Do x the way you just outlined and send me the final to review by Friday."

Notes

A series of 21 horizontal lines for taking notes.

Pre-Pilot Draft