

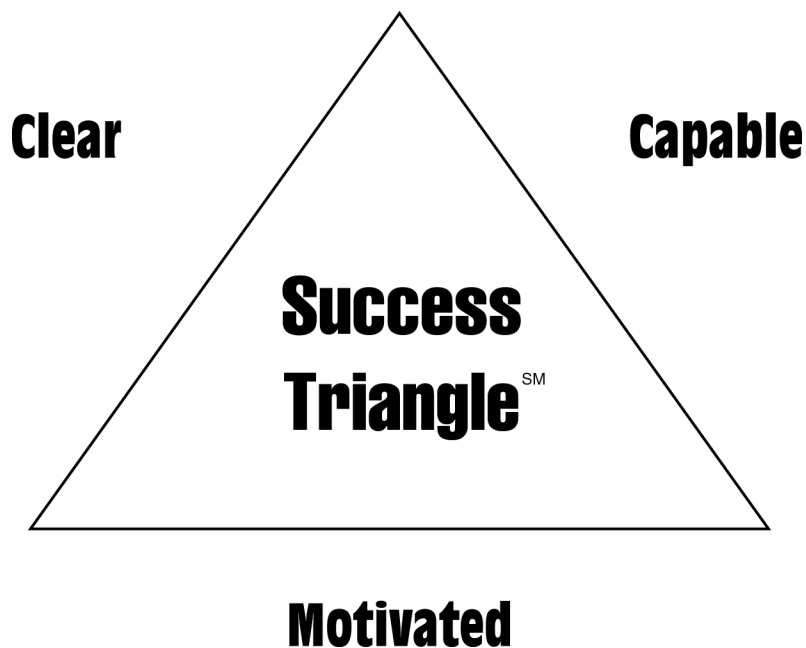
A light blue world map is centered in the background of the slide, showing the outlines of the continents. The map is positioned behind the main title text.

Coaching Branch Teams

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Objective of the Branch Coaching Session:

My Coaching responsibilities are for the following position(s):



The three steps to prepare for a coaching session are:

1. _____
2. _____
3. _____

Step One: Gather and Analyze the Data

1. Cross-Sell / Referrals to Other Lines of Business
2. Creating Awareness
3. Needs Assessment
4. Teleconsulting
5. Reactive Selling Probing Questions
6. Referrals from the Offer to Assist



What are the questions you would ask during the employee's observation?



Step Two: Select the coaching formats you may use to best fit the situation

One-to-One Coaching

• **Pre-Positioning**

Purpose of Session

- ---
- ---
- ---
- ---
- ---

Reasoning to Client/Member

- ---
- ---
- ---
- ---
- ---



Structured Coaching

Step Three: Method of Communicating Feedback

REDR Technique

1.

2.

3.

4.



Skill Building

What Skill Improvement	Plan for Improvement with Whom Involved	How Do We Know Success Was Achieved	By When



What are the keys to Effective Interactive Questioning?

Signs That Show Engagement and Interaction

1.

2.

3.

4.

5.

Coach's Log

Coach's Log		Coach/Manager:		
Player:		Location:		
Date	Notes: (Key Actions, Observations, and Feedback)	Follow-up Actions/ Commitments	Follow-up Date	Status



Take-Aways

More	
Better	
Different	
Less	

