SKILL DEVELOPMENT EXERCISES

SCENARIO

You have inherited a representative that is only partially meeting expectations with sales performance.

BEST PRACTICES: What does "good" look like?

Highly Effective Example:

- Seek to understand the situation; learn about the representative's perspective on performance, strengths, development needs, etc.
- Use performance data to show the representative how his/her performance looks in objective terms.
- Invest time in working with the representative and observing behaviors.
- Work with the representative to build a Plan of Action that addresses an area that he/she needs to focus on and grow.
- Keep a record of conversations with the representative; cite specific examples and situations.

Less Effective Example:

- Ignore objective performance measures; do not address performance issues.
- Wait to discuss performance issues until you get to know the representative and develop a better understanding of the District.
- Take a "hard-line" approach with the representative about improving the numbers.

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ACTION STEPS

1. **Establish your goals and objectives for an initial conversation with this individual.**

   - What do you need to accomplish during your first meeting that will help you begin the coaching process in a positive and productive way? Try to limit yourself to three goals or objectives, more than that often requires a second meeting.

2. **Determine what you'd like to learn from the representative and the questions you will ask to solicit this information.**

   - Script out your questions and be sure they are specific enough to identify development areas, yet broad and open-ended enough to allow the representative the opportunity to elaborate and provide some detail around their needs, issues and/or concerns.

3. **Identify the message, information and feedback you want to deliver.**

   - Again, script out the content of your message and how you will convey your thoughts clearly. Be sure the intent and message is concise and understandable. Consider having someone else review your comments prior to the session.

   - Document the discussion and expectations communicated in an email and provide to employee to ensure you both have a clear understanding.

4. **Craft your agenda for the session.**

   - What three topics would you like to address during the session? This is different than your goals and objectives. Think about *how* you will accomplish your objectives during the call to determine what items should be on your agenda. Like your goals, try to limit your agenda to three items; more than three is often too many. Be sure to share this agenda with the representative and start the session with a quick review. Provide the representative an opportunity to add to the agenda by saying: "Tell me what's top of mind for you ..."

5. **Consider your behavioral combinations.**

   - What specifically will you do to avoid falling into old patterns of behavior? Have any of the "ineffective" approaches above been pitfalls for you in the past? Be sure to identify a clear strategy or tactic to avoid repeating the past.

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Notes: ____

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