



Participant Workbook

Customer Relationships & Coaching

Assessing Team Strengths for Stronger Relationships



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Icebreaker

NOTES

Leadership Commitments

NOTES

STAR Program Check-in

NOTES

The STAR® Model



NOTES

Telling vs. Coaching

TELLING:

- Expedient
- No learning
- Must be told AGAIN
- No ownership

COACHING:

- More time upfront
- Once and done
- Solicits new ideas
- Creates ownership
- Transforms the culture

So, what makes it **so difficult to change?**

Asking Questions

What is the *focus* of your question?

- To evaluate their work
- Confirm your decision
- Test their abilities
- Couch advice

...Or is it to help **them** THINK and gain new insights?

Great Coaching Questions

"If you DID know, what would you say?"

"Tell me, what's really going on?"

"What's the inevitable consequence if you keep doing what you're doing right now?"

"What are the challenges – the REAL challenges – for you personally?"

Imagine that you had achieved this already. Now, looking back, what would you have changed?

PI Design Framework

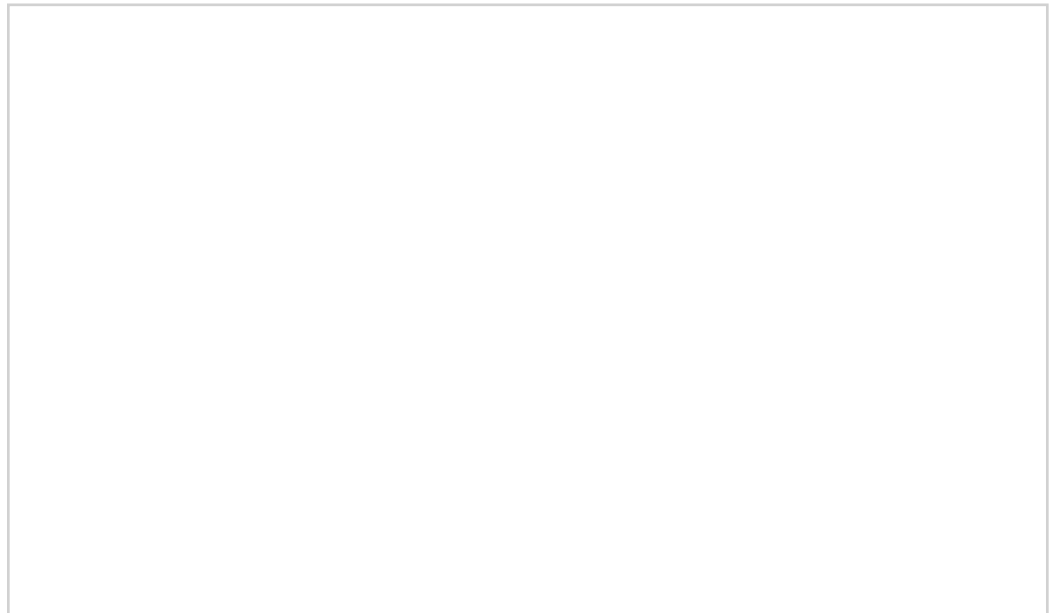
Teamwork &
Employee
Experience

Innovation &
Agility

Process &
Precision

Results &
Discipline

NOTES



Team Balancers



Why is this Important?

Decisions

- Collaboration
- Independence

Ideas

- Talk it through
- Reflect

Conflict

- Task-focused approach
- People-focused approach

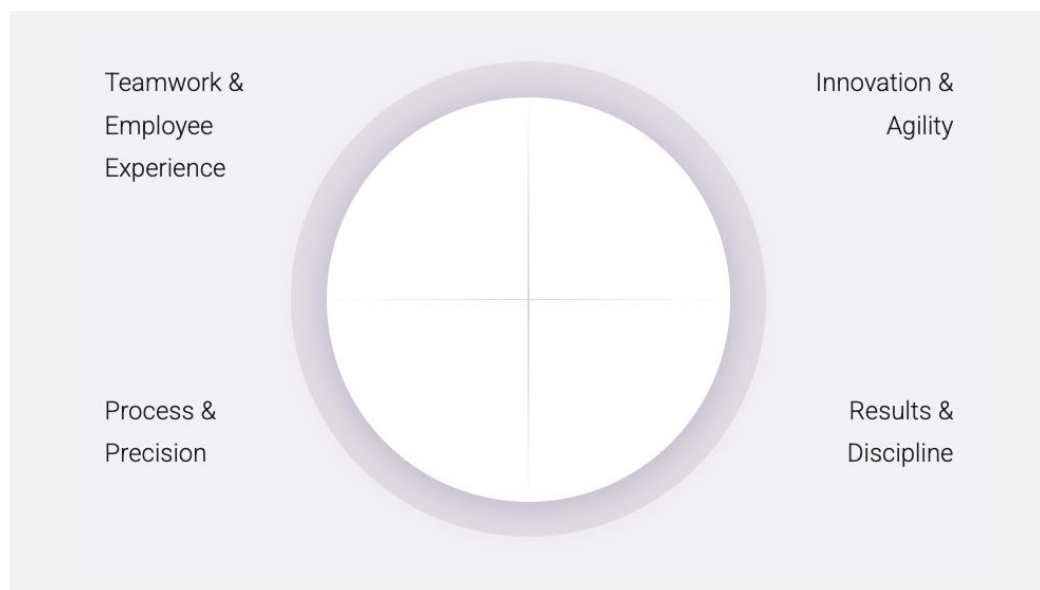


What is the Best Kind of Team?

INSTRUCTIONS

Imagine you are creating a team from scratch. You have hundreds of people to select from.

You can have five people on the team - where might you want them, in terms of strengths on the quadrants?



Case Study: HavenLiving

Dear HavenLiving Property Management,

I hope this message finds you well. I'm writing to share a few minor inconveniences that have recently transformed my once-delightful apartment into what I can only describe as some sort of doomsday escape room.

Exhibit A: The dripping faucet

My bathroom faucet has been dripping for 8 weeks. I assume that the faucet now qualifies for a spot on the lease. I've named it Drippy. Drippy and I get along well, except that it never sleeps and has singlehandedly inflated my water bill to sky-rocketing heights. I can only assume that Drippy is in some secret kickback deal with the local water department.

Exhibit B: The thermostat is gaslighting me

I turn it up, it turns itself down. I turn it down, it turns itself back up. It's either 63 degrees or 83 degrees. The thermostat and I are considering couples therapy to end this toxic relationship.

Exhibit C: The maintenance request black hole

I've submitted several written maintenance requests and have never received a reply. I now believe that you have such a large quantity of unanswered maintenance requests that the pile has created its own field of gravity which is so strong no request can escape and make it into your maintenance queue.

Exhibit D: Communication?

I've left several voice messages with the leasing office for updates on repairs and billing. I am now starting to think the messages are being placed into some sort of time capsule that you will listen to in the next century and say: "Hahaha, remember when apartments had thermostats!"

In summary:

I say all this with humor because I do enjoy living in this community – but a little more consistency in communication and responsiveness would go a long way. I know things are busy, but I'm confident that with a few system tweaks, HavenLiving could keep me as a tenant.

Thanks for your time, and please send help (and maybe a wrench).

Warm (and sometimes freezing) regards,

Jordan M.

Apartment 204B

The Glades at HavenLiving

P.S. Drippy says hi.

Root Cause

A root cause is the **fundamental reason** why a problem occurs - it's the underlying issue that, **if addressed, would prevent** the problem from happening again.

It's different from symptoms (what you see) or immediate causes (what directly triggered the problem).

ACTIVITY



Customer Service Issues

INSTRUCTIONS

Brainstorm possible causes that could explain some of the customer service issues identified in the complaint letter. **What might be the root cause?**

CEO Objectives

Goal	CEO Rationale
Increase team cohesion in order to improve team level results.	The teams at remote offices are not gelling. There has been a lot of turnover in some locations. Some locations have lost the passion for customer service that was once a cornerstone of the company.
Implement structures or procedures to handle the needs of our growing workforce.	We are growing fast and want to open some new locations in the near future. We need to onboard new people and get them up to speed quickly.
Cut down on waste and improve efficiency in our work to help improve the bottom line.	We are not working efficiently. Timing is essential, or a small leak turns into a major repair if we can't get this working like a well-oiled machine.

NOTES



Identifying Team Type

INSTRUCTIONS

Each group will receive a packet. The tiger team data will differ but the process is the same. Answer the questions in your packet and prepare a description of your team that includes:

Team type:

Your observations about the team:

A caution area:



Your Teams

INSTRUCTIONS

Log into the PI software. Find your team and click “Continue Team Discovery.” Answer the questions below.

What strengths does your team have to help themselves?

Which caution area might have the greatest impact on them?

Take a moment to consider a current opportunity for you to utilize the Design aptitude with your team.

What steps will you need to take to make this a reality?

How will you hold yourself accountable?

DAY 2

Participant Workbook

Coaching for Accelerated Performance

Turning Insight into Action to Drive Performance



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Leaders and Managers

INSTRUCTIONS

Think about the **best coach** you've ever had. What did they do (or not do) that made them so effective?

What was **their impact** on you?

Self-Awareness and Engagement

Engagement isn't about happiness...
It's about productivity.

18%

Higher Productivity

20%

Higher Sales

23%

Higher Profitability

58%

Fewer Employee Safety Incidents

41%

Fewer Quality Incidents

10%

Higher Customer Metrics

81%

Lower Absenteeism

43%

Lower Turnover

28%

Less Shrinkage



70% OF FLUCTUATION IN ENGAGEMENT IS DIRECTLY ATTRIBUTABLE TO THE QUALITY OF THE MANAGER.

LEADERS WHO FOCUS ON STRENGTHS CREATE MORE ENGAGED EMPLOYEES.

Source: Gallup, 2024

High-Performer Stats

800%

Even More Valuable Than You Think

HPs are 8x more productive than average performers.

Engaged?

Maybe Not.

HPs are only "very slightly" more satisfied than others.

Staying?

Maybe Not.

20% of HPs intend to leave in the next six months.

#1

Compensation

For HPs, the #1 satisfaction and retention factor is compensation.

#2

Coaching & Feedback

For HPs, the #2 retention and satisfaction factor is coaching and feedback.

How Often?

Monthly Feedback

HPs want coaching and feedback on a monthly basis. The vast majority of employers don't come close to delivering.

Reviewing the Math

Performance:	Loans/month:	Productivity vs. top 50:
Top 50 Performers:	12	--
Average Performers:	4	33.3%
Bottom 50 Performers:	1	8.33%

Performance	# Loans/Month	Performance Increase	# Employees Improved	Add'l Loans/Year
High	12.0	7%	*30 Employees	303
Average	4.0	10%	*63 Employees	302
Low	1.0	25%	*100 Employees	300

ACTIVITY



Your Coaching Experiences

INSTRUCTIONS

What **obstacles** or **frustrations** have gotten in the way of **effective coaching** in the past?

What is Needed?

When should the leader **train?** **coach?** **manage?** **mentor?**

If the employee/coachee needs...	...then the leader/coach provides:
Knowledge. Understanding.	TRAINING
Practice executing. Confidence.	COACHING
Failure prevention.	MANAGEMENT
Enhancement of good performance.	COACHING/MENTORING



Good coaching is intended to:
Increase performance. NOW.
Improve retention (especially high performers).
Enhance engagement.
Develop.

Fundamentals of a Coaching Conversation

- State your purpose.
- Share observations.
- Ask questions.
- Help *them* find the solution (don't give them the answers!)
- Transfer ownership of action items.



Role Play A - Coach

Prep Time: **5 minutes**

Coaching Role Play: **10 minutes**

Debrief: **5 minutes**

SCENARIO | COACH

Your employee has been with you for six months. While they have done a solid job fitting into the culture, they are not fully meeting expectations for the role.

This employee has been trained, and you've had several conversations to provide feedback, offer tips and pointers and get them engaged in understanding the critical steps for their position. You've seen some efforts here and there, but the results aren't happening.

The employee's attitude is fine, and they have a good solid work ethic, but they just struggle when it comes to getting the job done quickly and efficiently. It's time for a much more in-depth coaching conversation, to get underneath what's happening here, and how you might make an impact with this person.

OBJECTIVES:

1. Understand the employee's perspective: How do they view their own performance?
2. Uncover what might be getting in the way of their performance.
3. Get their input on how and why they are struggling, and what they think they need.
4. Explore with them solutions and build a plan to increase their performance.



Role Play A - Employee

Prep Time: 5 minutes

Coaching Role Play: 10 minutes

Debrief: 5 minutes

SCENARIO | EMPLOYEE

You've been with the company for less than six months. You enjoy the work you do, and the people you work with.

Your coach (leader/manager) has talked about your overall performance being behind, but you believe that it will come around in time, as you learn the job. You are making some efforts, but the role/work isn't feeling natural or comfortable yet.

You are looking for help, but you aren't exactly sure how to do this, or "what to do."

OBJECTIVES:

1. **Make it clear that while you aren't opposed to improving your performance, you aren't used to some elements of the job. Discuss how you should go about getting better.**
2. **Explore solutions with the coach and build a plan to increase your performance and get you comfortable in your role.**
3. **At the end of the role play, give your coach feedback on whether their coaching style was effective.**



Liz and John Case Study

John is relatively new in his role as a teller, having been with Oshkosh Bank for just three months. It is also John's first position out of college.

During a scheduled meeting with Liz, his manager, John is surprised to hear that Liz has concerns about his interactions with customers. Liz explains, rather directly, that John's technical skills are fine; however, his "people" skills are lacking, and he will need to improve the way that he engages customers.

John is a little put off by her comments but manages to gather himself and asks Liz for examples of when he did not engage customers properly.

Liz is in a hurry and views John's request as being defensive. She responds by telling John that she does not have time now to go into specifics but just needs John to pay attention to his soft skills and engage his customers in a friendlier manner.

Liz leaves convinced that John gets the point and is certain that he will shape up. Problem solved! John leaves the meeting feeling dejected and unsure of exactly what he needs to improve. Moreover, he felt he was providing superior customer service to clients and is hurt by her comments. John thinks, "Maybe this isn't the right place for me."



Branch Manager

Bank Teller

DISCUSSION POINTS:

What's at stake?

Who (or what) was right?

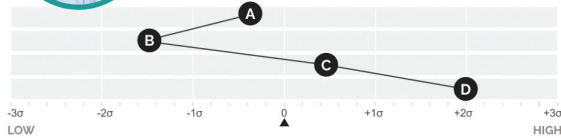
Who (or what) was wrong?



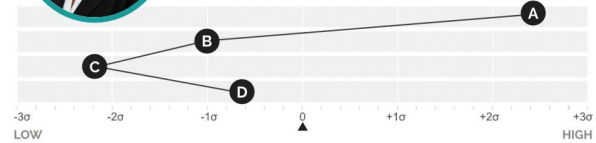
Liz and John Motivating Needs



John, Bank Teller



Liz, Branch Manager



INSTRUCTIONS

In your groups, examine Liz and John's Behavioral Patterns and answer:

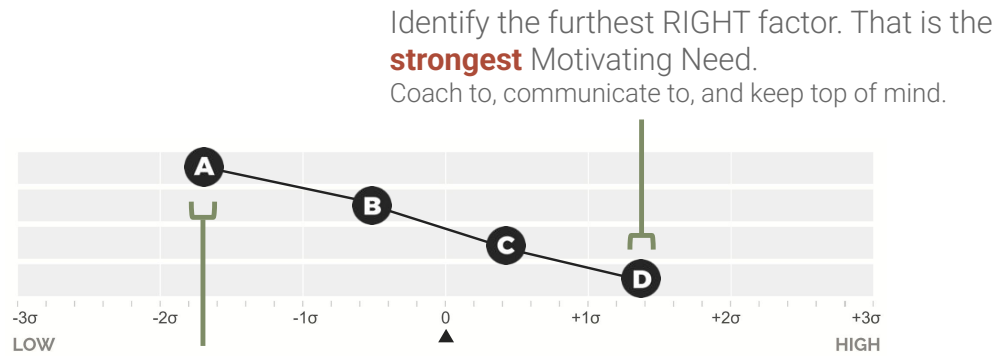
What is **Liz's strongest Factor** (farthest from the midpoint)?

What is **John's strongest Factor**?

What does John need in order to **be productive**?

What **adjustments** do you recommend for Liz?

Identifying Motivating Needs



Identify the furthest LEFT factor. This is likely the **next strongest** motivating need. This should color, flavor, impact how you approach the strongest Motivating Need.

NOTES:

Strongest Motivating Needs

Their Strongest Motivating Need

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

My Strongest Motivating Need

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

Similarities and differences:

Things to consider when we interact:



Pivoting My Style

INSTRUCTIONS

Complete the Motivating Needs chart (prior form) using your Behavioral Assessment results and the results of one of your employees.

Identify **one or two actions you can take with this particular employee** to have more effective communication. Share those with your partner.



Understanding the Alien Species

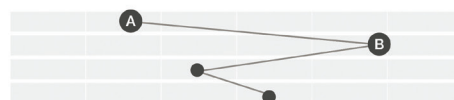
INSTRUCTIONS

You'll pair up based on your PI Factor Combos. Fill out your workbook for your opposite Factor Combo. Pick a spokesperson to report out.

Factor Combo A:B | Orientation



A>B **Task-Oriented**



B>A **People-Oriented**

What do they value?

What is most important to them?

What frustrates them?



Understanding the Alien Species

INSTRUCTIONS

You'll pair up based on your PI Factor Combos. Fill out your workbook for your opposite Factor Combo. Pick a spokesperson to report out.

Factor Combo A:C | Action



A>C **Proactive**



C>A **Responsive**

What do they value?

What is most important to them?

What frustrates them?



Understanding the Alien Species

INSTRUCTIONS

You'll pair up based on your PI Factor Combos. Fill out your workbook for your opposite Factor Combo. Pick a spokesperson to report out.

Factor Combo A:D | Risk



A>D **Comfortable w/Risk**



D>A **Cautious with Risk**

What do they value?

What is most important to them?

What frustrates them?

What Motivates My Employees?



70% of GREAT managers motivate their employees to do outstanding work.

Leaning into Strengths is Critical

Our goal is to have people start doing something:

- More consistently
- With increased frequency
- At higher levels of quality or proficiency
- With more ease and comfort
- With more confidence, etc...
- ...And in some cases, we're asking people to start doing something that might be unfamiliar, new, different, unknown, unproven, daunting.



This is using simple brain science to get better outcomes.

Leaning into Strengths is Critical

The adult brain likes familiar.

People need confidence to start, enhance, improve, or try something they haven't done.

Reminding people of their strengths:

- Reminds them of what they are very good at.
- Creates confidence.
- Helps generate ideas.
- Creates ownership of ideas.
- Increases the speed to, and chances of success.

Coaching Conversation PREP FORM

The **goals** of this coaching session:

1.	
2.	

What are their **three strongest factor combinations**?

What is **valuable** about this?

1.	
2.	
3.	

1.	
2.	
3.	

Their **strongest motivating needs** are:

My **strongest motivating needs** are:

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

(Farthest right and farthest left on self graph)

The areas I need to **adjust** are:

Examples of **how** to adjust:

1.	
2.	

1.	
2.	



Role Play A – but with the BA! – Coach

Prep Time: 10 minutes

Coaching Role Play: 10 minutes

Debrief: 5 minutes

SCENARIO | COACH

Your employee has been with you for six months. While they have done a solid job fitting into the culture, they are not fully meeting expectations for the role.

This employee has been trained, and you've had several conversations to provide feedback, offer tips and pointers and get them engaged in understanding the critical steps for their position. You've seen some efforts here and there, but the results aren't happening.

The employee's attitude is fine, and they have a good solid work ethic, but they just struggle when it comes to getting the job done quickly and efficiently. It's time for a much more in-depth coaching conversation, to get underneath what's happening here, and how you might make an impact with this person.

OBJECTIVES:

1. Understand the employee's perspective: How do they view their own performance?
2. Uncover what might be getting in the way of their performance.
3. Get their input on how and why they are struggling, and what they think they need.
4. Explore solutions with them and build a plan to increase their performance.

Additional Information:

Using your notes from the first round, fill out the Coaching Conversations Prep Form to think about the employee's Behavioral Assessment Results (use your partner's actual BA Results). In your role play, use the employee's Factor Combinations to coach to their strengths. Using the employee's Motivating Needs, how will you pivot your communication style?



Role Play A with BA - Employee

Prep Time: 5 minutes

Coaching Role Play: 10 minutes

Debrief: 5 minutes

SCENARIO | EMPLOYEE

You've been with the company for less than six months. You enjoy the work you do, and the people you work with.

Your coach (leader/manager) has talked about your overall performance being behind, but you believe that it will come around in time, as you learn the job. You are making some efforts, but the role/work isn't feeling natural or comfortable yet.

You are looking for help, but you aren't exactly sure how to do this, or "what to do."

OBJECTIVES:

1. **Make it clear that while you aren't opposed to improving your performance, you aren't used to some elements of the job. Discuss how you should go about getting better.**
2. **Explore solutions with the coach and build a plan to increase your performance and get you comfortable in your role.**
3. **At the end of the role play, give your coach feedback on whether their coaching style was effective.**

Additional Information:

Using your Behavioral Self Graph (your actual strengths, motivations, communication needs) evaluate how well your coach does in engaging your strengths, tapping into your motivating needs, and communicating in a style that is effective for you.

If they do a good job in evaluating how to leverage your strengths, and communication needs, be very cooperative and engaged in the coaching session.

If they don't, show some reluctance, push back and indicate your lack of enthusiasm.

Coaching Best Practices

Good coaching:

Is designed for the person being coached

(PI, motivating needs)

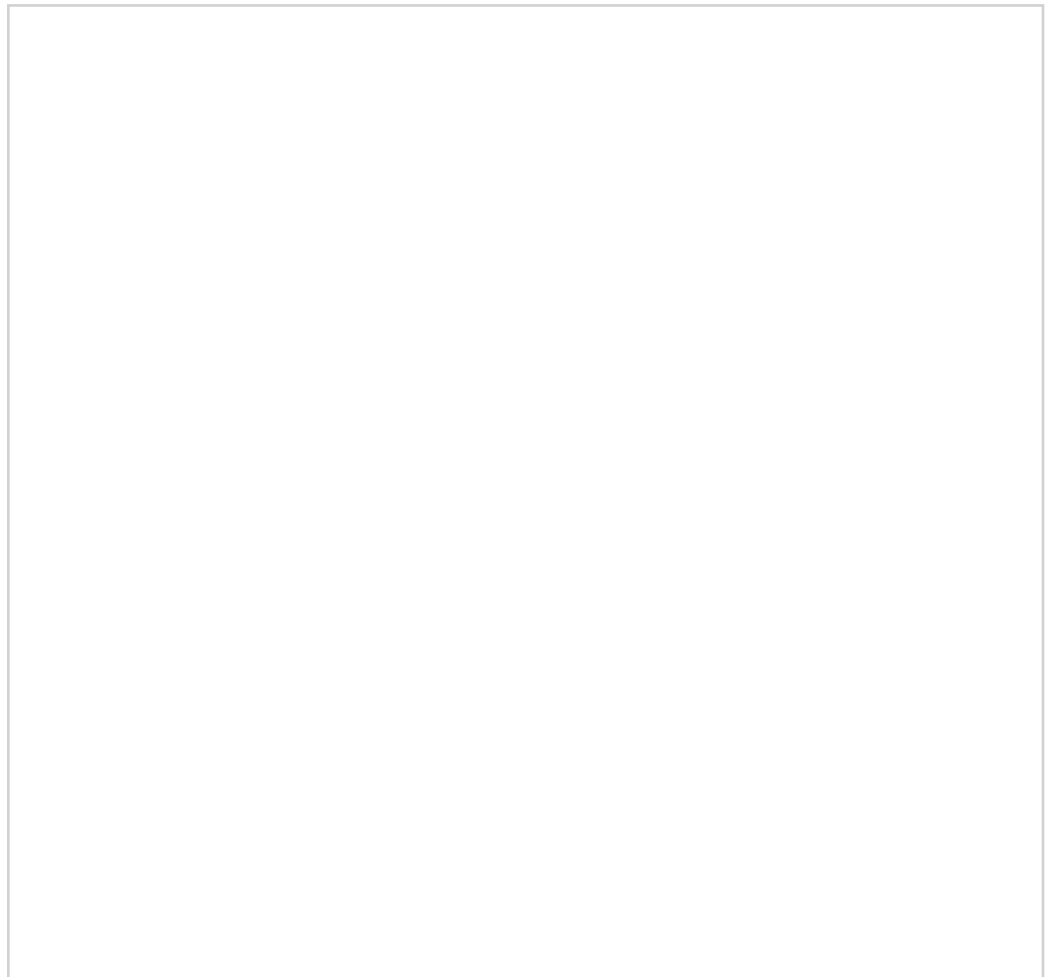
Uses assessments, data, and other tools

(Behavioral needs, cognitive agility, performance data)

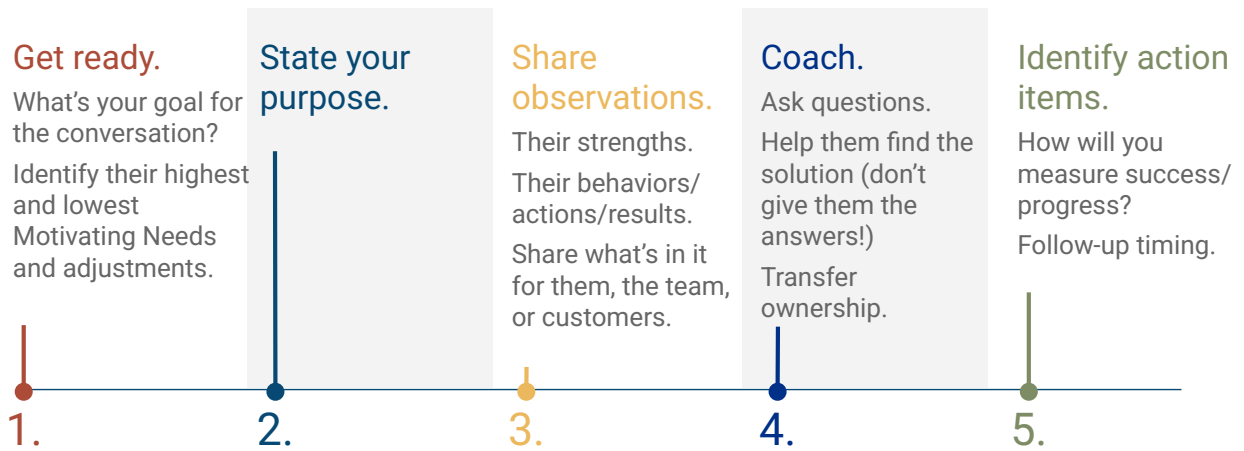
Focuses on driving results in the near-term

Three Degrees of Coaching

NOTES:



The Coaching Process



NOTES:

Coaching Conversation PREP FORM

The **goals** of this coaching session:

1.

2.

What are their **three strongest factor combinations**?

1.

2.

3.

What is **valuable** about this?

1.

2.

3.

Their **strongest motivating needs** are:

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

My **strongest motivating needs** are:

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
☐ Privacy/Independence	B	Inclusion/Connection ☐
☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

(Farthest right and farthest left on self graph)

The areas I need to **adjust** are:

1.

2.

Examples of **how** to adjust:

1.

2.

Coaching Conversation PREP FORM

State **purpose**:

Questions to ask:

Share **observations**:

Their **ideas**:

☐ Agreement?

☐ Willingness?

Actions/next steps:

Owner:

By when?

Success/progress measures:



Role Play B – Coach

Prep Time: 7 minutes

Coaching Role Play: 10 minutes

Debrief: 5 minutes

SCENARIO | COACH

Your employee has been with the organization for a number of years. They are never your best employee, or your worst. They have some really great months now and then, and usually have a solid year. And their performance is never bad – they don't need to go.

However, you're frustrated. You've seen them have really good levels of productivity and then drop down to mediocre levels of performance.

Their attitude and behaviors are... fine. Not great. Nothing really problematic. Just okay. Not an informal leader on the team, but not a disruptive problem child either.

Most frustrating to you: when you put in a lot of effort, and really **MANAGE** them, and are on them, they'll pick up their performance. When you don't, their performance slips back.

You'd like to get more consistent performance out of them, without needing to do all the heavy lifting and babysitting. Sustained improvement would be a big lift for your team.

OBJECTIVES:

1. **Complete the Coaching Prep Form so you know how to position your coaching. Use your partner's actual PI Behavioral Assessment to help you prep.**
2. **Work with them to get an understanding of – and agreement to – the fact that their performance jumps up and down.**
3. **Understand what they need; what would be effective/helpful so that you don't need to manage them so closely and intensely to get good results.**
4. **Identify some techniques/approaches that would make the employee more self-sufficient.**



Role Play B – Employee

Coaching Role Play: **10 minutes**

Debrief: **5 minutes**

SCENARIO | EMPLOYEE

You've been with the organization for a number of years, and you've been a solid performer and employee the whole time.

You've had some great months and results from time to time, helped a lot of others, and have never been a problem.

Yet, you've often felt overlooked, and not appreciated. You haven't won a string of awards, but your long service and consistent track record seem to be taken for granted. New employees, top performers, and poor performers seem to get all the attention – and resources – from management.

At times, your leader seems very engaged and communicates with you, which you appreciate and get value from, but then it stops. You are not seeing the point in your loyalty and consistency – you feel like you get forgotten.

But, you aren't ready to leave yet. You're looking for something that would invigorate you again.

OBJECTIVES:

1. **Make it clear you often feel like an afterthought, and you only seem to get attention when things aren't going great for you.**
2. **Tell them you are feeling discouraged and less engaged than before, and you may be having some doubts about your future at this organization.**
3. **Share that you feel invigorated and do get real value when your leader engages with you. You're interested in getting more coaching and development to become a high performer.**
4. **Using your Behavioral Self Graph (your actual strengths, motivations, communication needs), evaluate how well your coach engages your strengths, taps into your motivating needs, and communicates in a style that is effective for you.**



Coaching High Performers

INSTRUCTIONS

What's difficult about coaching High Performers?
What gets in the way?

NOTES:

Challenges

"They're already good enough, I don't have time."

Remember the math?
It proves out!

"I don't have the answers. I don't know where to start."

Your role is giving perspective and asking good questions. Let the HP build and create ownership of their own development plans.

"They are very different from me."

Learn how to connect using their Motivating Needs.

Coaching Conversation PREP FORM

The **goals** of this coaching session:

1.

2.

What are their **three strongest factor combinations**?

1.

2.

3.

What is **valuable** about this?

1.

2.

3.

Their **strongest motivating needs** are:

LOW		HIGH
☐ Harmony/Collaboration	A	Outcomes/Control ☐
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☐ Action/Variety	C	Stability/Predictability ☐
☐ Freedom/Big Picture	D	Clarity/Expectations ☐

My **strongest motivating needs** are:

LOW		HIGH
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☐ Freedom/Big Picture	D	Clarity/Expectations ☐

(Farthest right and farthest left on self graph)

The areas I need to **adjust** are:

1.

2.

Examples of **how** to adjust:

1.

2.

Coaching Conversation PREP FORM

State **purpose**:

Questions to ask:

Share **observations**:

Their **ideas**:

☐ Agreement?

☐ Willingness?

Actions/next steps:

Owner:

By when?

Success/progress measures:



Role Play C – Coach

Prep Time: 10 minutes

Coaching Role Play: 10 minutes

Debrief: 5 minutes

SCENARIO | COACH

The employee has been with you for a few years, has mastered their job, and is one of the best performers on your team – very consistently.

They have made it clear they aren't interested in moving into management, but they've also been clear that they want to continue to grow and develop.

In addition to their excellent performance, historically, they've had a positive attitude, been helpful and supportive to other employees, and been a positive presence on the team.

Recently, you've noticed that your employee seems to be a little less engaged than usual – maybe bored, maybe worn out, maybe they lost some confidence in the organization... who knows.

You're also concerned that while they do what they are asked, they are starting to voice the fact that they don't see the point in doing extra, or working even harder, as they already carry more than their fair share.

You are concerned about retention, and while you always do a nice job of recognizing this employee, you are concerned this is not enough to keep your star performer.

OBJECTIVES:

1. **Complete the Coaching Prep Form so you know how to position your coaching. Use your partner's actual PI Behavioral Assessment (BA) to help you prep.**
2. **Your objective for this Coaching session: Work with them to identify some ways you can together take advantage of their strengths and behaviors. Figure out potential solutions to get the employee re-engaged.**



Role Play C – Employee

Prep Time: 10 minutes

Coaching Role Play: 10 minutes

Debrief: 5 minutes

SCENARIO | EMPLOYEE

You've been with the organization a few years, and you have been a top performer on the team – you have mastered the job. You have a good relationship with your boss, and they have done a good job of recognizing your excellent performance.

Recently, you've gotten a bit bored, and things are getting stale for you. You are VERY intent on continuing to be challenged, and given new opportunities and experiences so you can grow.

Although you have no interest in moving into management, you also are very concerned that this means there won't be new challenges for you to take on, learn from and grow from. For the first time, you've started to wonder if it's time to move on and find something new.

You like your job, but your engagement has waned. Your energy for the role – and doing everything you've always done – is not where it once was.

You're frustrated that leadership is always asking you to do more because you're a top performer. You are not seeing the point in "just doing more work."

But, you aren't ready to leave yet. You're looking for something that would invigorate you again.

OBJECTIVES:

1. **Make it clear to your leader that you are very interested in continuing to grow and develop, even though you don't want to become a leader yourself.**
2. **Share that you're no longer feeling challenged by the "extra" work you're being given.**
3. **Using your Behavioral Self Graph (your actual strengths, motivations, communication needs) evaluate how well your Coach does in engaging your strengths, tapping into your motivating needs, and communicating in a style that is effective for you.**



Conclusion/Wrap-up

INSTRUCTIONS

Answer the questions below and be ready to share with the group:

What **ONE most important action/commitment** will you will take?
WHEN will you take it and how will you know you've been successful?

Choose an **accountability partner**. Write their email address here.
Share your commitment with them and describe what would keep you accountable. Be prepared to share out loud.

Customer Relationships & Coaching Appendix

Motivating **NEEDS**

	Motivated By:	How to Connect:	Challenges:
High A	Independence, CONTROL , competition, OUTCOMES , individual recognition.	Bottom line, direct to the point. Outcomes, outcomes, outcomes.	They will argue with you. Everything is a chance to win.
Low A	Encouragement, reassurance, HARMONY , team environment.	Ask for their help based on their expertise, attitude. Considerate, supportive, encouraging dialogue.	Will say things are fine, when they aren't, especially when feeling confronted or responding to a harsh approach.
High B	Positive, personal, public praise. INCLUSION, SIGNS OF STATUS, ACCOMPLISHMENT.	Inclusion: share info, ask their opinion. Never criticize in public, build a relationship, recognition for how they do things with people.	Will get defensive, make excuses out of a desire to protect their image.
Low B	Recognition for technical accomplishments/expertise, time to think, FREEDOM FROM POLITICS.	Allow time to think, clear, factual communication, freedom from too much small talk, straightforward, analytical approach.	May not say much, engage in discussion, tell you how they are feeling, avoid focusing on the "people part."
High C	Paying attention to them. SECURITY, STABILITY , family-like work team, recognition for LOYALTY.	Scheduled: meetings, conversations, everything. Time to consider and reflect before deciding, lessen pressure, give full attention, be very specific on time frames, deadlines.	May be uncomfortable/resistant to changes in routine, schedule, comfort zone. Needs time to think, consider, get used to change.
Low C	VARIETY, CHANGE OF PACE , mobility, lots to do.	Brief, bulleted communication about the action/point, immediate feedback, load them up with a variety of challenges, pressure is productive.	Will interrupt, may not listen well. Can be tense and frustrated when change isn't fast enough for them.
High D	OPPORTUNITY TO GET THINGS RIGHT , structure, plan, SPECIFIC JOB KNOWLEDGE , freedom from risk, RECOGNITION FOR ACCURACY.	Written, precise expectations. Very specific and frequent feedback with examples; opportunities to develop subject-matter expertise, specialized training.	Very sensitive to criticism (they work hard to make NO mistakes.) Very hard on themselves for anything not done exactly "right."
Low D	FREEDOM FROM STRUCTURE , delegate details, give room to decide how, BIG PICTURE FOCUS.	Flexible, informal, casual interactions. Focused on big picture with strong clarity around "guard rails." Freedom from structure.	Thick-skinned, stubborn about their way. May not care very much about your rules, policies, procedures.
Logical	Being correct, ensuring the right decision, driven by data.	Logic, data, analysis, facts, evidence of why something will succeed.	Will slow down or stop when they don't have enough time, data, info to decide.
Intuitive	Deciding, using emotion, gut, experience and going for it.	Flexibility, use estimates, get 80% of what you need and go, consider their emotions.	Will decide, but sometimes wrong. Emotion can drive rash decisions.

Factor COMBINATIONS

	A > B Task Oriented	B > A People Oriented
ORIENTATION	Critical creative thinker Technical orientation Inquiring mind Problem solving Results-oriented Limited delegation	Empathetic, unselfish Persuasive Sociable Service-oriented Delegates authority Comfortable on a team
	A > C Proactive	C > A Responsive
ACTION	Takes initiative quickly Competitive Driven to get things done Positive response to pressure Impatient with routine Achievement-oriented	Consistent with repetition Cooperative with others Patient, tolerant Dependable Steady Easy-going
	A > D Comfortable with Risk	D > A Cautious with Risk
RISK	Independent Individualistic Self-confident Firm, decisive Venturesome Resistant to authority	Cooperative, supportive Willing and helpful Need for rules and structure Accurate and careful Concerned about criticism Conservative
	B > C Quick to Connect	C > B Takes Time to Connect
CONNECTION	Fluent, fast-talking Lively, enthusiastic Optimistic style of expression Persuasive, stimulating Motivates others Positive communication	Reserved, quiet Serious with unfamiliar people Comfortable with familiar Introspective, time to think Organizes thoughts before expressing self
	B > D Informal Operating Style	D > B Formal Operating Style
INTERACTION	Extroverted, outgoing Uninhibited expression of friendliness Informal in social situations Persuasive, enthusiastic talker Engaging conversationalist	Serious, sincere Disciplined Reserved, formal, quiet Factual conversationalist Sensitive to criticism Cautious with new people
	C > D Casual with Rules	D > C Careful with Rules
RULES	Persistent Casual, stable Limited concern about rules or details Comfortable with ambiguity Easygoing, relaxed	Conscientious Thorough, precise Concerned with rules and accuracy Strong follow-up Strict about punctuality, correctness Comfortable with clarity

COACHING QUESTIONS Topic Library

By asking powerful questions, the leader invites the employee to clarity, action, and discovery at a whole new level. They are generally open-ended questions that create greater possibility for expanded learning and fresh perspective. Below are some topics to get your questions started.

INVESTIGATIVE:

Share with me what is happening now.
Describe the results produced so far.
Tell me what's working; what's not.
Describe areas that are unclear for you.
Help me understand your vision for success.
Share what's most important for you.
Tell me what's top of mind.
Describe what's most critical.
Explain the roadblocks you're experiencing.

PRODUCTIVE:

Describe the desired outcome.
How can you get started?
What else do you need to take action?
Walk me through some options you could pursue.
Identify some milestones on the path.
Share what you'll do as a result of this conversation.
What's the timeline?
Share what roadblocks you're anticipating.
How will you know you've succeeded?

SUBJECTIVE:

Help me understand your view on this.
How do you really feel about...?
Describe what most excited you.
Share with me what you're most worried about.
Share with me what has you feeling frustrated.
Describe what you're most confident about.
Describe any hesitations you have.
Share what you'll take away from this.
How did [other person] react when you shared this with them?

SPECULATIVE:

I wonder how you might...

- ...capitalize on your experience?
- ...explore some other angles/perspectives?
- ...handle this another way?
- ...reframe this?

Describe what happens if this continues.
Describe what happens if nothing changes.
Share with me another possible point of view.
Explain the other possible options.

INTERPRETIVE:

Share what might happen if this doesn't work.
Describe the real issue here.
Share with me what led to that.
How might you look back on this in five years?
Share your assessment of the situation.
If you could do that over again, what would you do differently?

PI STRENGTHS:

Highest A

- How can you build on your natural desire for outcomes, to see success?
- How can you adapt to be more collaborative to get the outcomes you're looking for?

Highest B

- How can you use your natural ability to persuade and connect to help get you the outcomes you want?
- How would being a bit more reflective in your approach enhance your credibility with others?

Highest C

- How could you apply your thoughtful, persistent approach to get the outcome you want?
- What would help make you comfortable in speeding up how you take action in this area?

Highest D

- How could you leverage your desire to get things exactly right in this situation?
- What's the best way for you to get more comfortable in uncertain situations?

Powerful **COACHING QUESTIONS**

OPENING, SCOPE & FOCUS QUESTIONS

- ◆ What outcome are you seeking by the end of this discussion?
- ◆ What do you want to move forward on?
- ◆ What would be the most helpful thing for you to take away from this discussion?
- ◆ What would good look like?
- ◆ What's the issue?
- ◆ What is happening now that tells you...?
- ◆ What makes you say that?
- ◆ What's the current situation?
- ◆ What's the impact of that?
- ◆ What actions have you already taken?
- ◆ What is your concern about it?
- ◆ Bigger than/more than what?
- ◆ What happened next?
- ◆ What makes you think you need to do something different?
- ◆ What else bothers you? And what else? Tell me more about that.
- ◆ What must change about the situation?

EXPLORATION & INSIGHT DEVELOPMENT QUESTIONS

- ◆ How much control do you personally have over the outcome?
- ◆ Let's look into the future. What would your ideal situation be?
- ◆ If you could do anything what would you do?
- ◆ Who else could you speak to?
- ◆ If you were to look at it from 'X's point of view, what do you think they would say?
- ◆ Imagine this had been achieved already – what was it that had to change?
- ◆ If 'Y' were to get involved, where would they focus their effort?
- ◆ What's stopping you from doing more?
- ◆ What obstacles will need to be overcome?
- ◆ How could you solve that?
- ◆ What, if any, internal obstacles or personal resistances do you have to taking action?
- ◆ What resources do you already have?
- ◆ What other resources will you need? Where will you get them from?
- ◆ What is really the issue here, the nub of the issue or the bottom line?
- ◆ How much of the situation do you feel is within your control?
(Frequently it is a big issue for people to realise that ultimately their situation is their choice. They often feel a victim and therefore experience themselves as powerless.)

EFFECTIVE COACHING CONVERSATIONS



HOW OFTEN?

At least once a month, especially for **High Performers**.

HOW LONG?

15-20 minutes is ideal.

GOOD COACHING IS INTENDED TO

- Increase performance. NOW.
- Improve retention (especially high performers).
- Enhance engagement.
- Develop.

COACHING BEST PRACTICES:

Designed for the person being coached (PI, motivating needs)

Uses assessments, data, other tools (BA, CA, performance data)

Focuses on driving results – in the near term

Has strong clarity of purpose, approach

Involves asking good questions to create ownership

BEFORE THE CONVERSATION

- Identify 1-2 concise objectives for the conversation
- Review their 3 **strongest behaviors** and 1-2 **Motivating Needs**
- Determine how you will adjust your behaviors and show up to make the conversation effective

DURING THE CONVERSATION

Prepare **deliberate and specific observations** and feedback:

- What I've observed...
- The impact is...
- This matters because...

Ask **questions to get them engaged** in the conversation (**Hint: let them talk**)

- What stands out for you about what I observed?
- What's the real challenge here for you?
- What thoughts do you have?

ACTION PLAN

- Have employee come up with ideas for a "go-forward" plan and decide on the best one together
- Create specific objectives that can be measured
- Determine employee's role and leader's role
- Set follow up date with clear expectations

