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**Participant:** John Doe (78273)

**Assigned Coach:** Austin Weaver

**Event Date:** 8/6/2008 2:00:00 PM **Event has occurred in the past**

**Completion Date:** 8/7/2008 10:25:56 AM

**Last Updated:** 8/7/2008 10:25:56 AM

**Date Added:** 8/6/2008

**Admin Comments:**

**Action Item:** Scheduled Coaching Call

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**Leader's Comments:**

**Coach's Comments:** John Doe has been with the company in a field service capacity for seven years. He applied for an opening as a branch office manager 2 years ago and this year he was selected to replace a manager that retired in the regions city office. He has been in this position for the last six months. His current major challenge is one, which involves managing his former co-workers. His city office not only supervises the operations of two field teams but also manages two customer service representatives and two business administration employees who he has known for 4 years. Another challenge he has includes budgeting his time between his office and traveling to the corporate office. He meets on a monthly basis at the home office and participates as part of a team of city managers responsible for managing budget and strategic expansion plans of the company.

**What are the strengths you feel this leader possesses?** Based upon the assessment data, John Doe's core strengths include communications and people leadership. Evident from our discussions and his specific comments regarding how he uses his communication strength, he is also a strong problem solver.

**What are the areas for development you feel this leader should focus on?** After identifying some of his immediate job concerns and linking them to both his areas of strength and areas for development, John Doe determined that his future success would be based upon how well he addressed respectful confrontation with his peers and how best to motivate his office staff to keep customer service as the priority for the city office.

**What action item(s) do you recommend for this leader in order to achieve their desired goal?** Several key focus points were communicated to John Doe. 1. Use strengths to develop areas, which have development opportunities. a. He has strong problem solving skills, which can be used to improve communications, build trust, and gain commitment, especially when communicating to his peers and co-workers. 2. Demonstrate a willingness to work on opportunities for development by using a development plan, to guide, record actions taken for development, and identify which actions were most successful, in a time specific and measurable manner. a. Use the guidelines developed by Edge Training, which can allow John

to record his action plans associated to his development plan. This can be done on-line or in a printed format or both. 3. Identify resources within the company that are available for him to use. a. John Doe was informed as to what his company internal training resources included. Suggestion was made for him to take an internal self-awareness course along with a technical course on budgets to improve his business savvy. b. John Doe was unaware that his company had provided him with an opportunity to take advantage of on-line training from Edge Training, as well as additional coaching sessions. 4. Identify resources “Tips and Techniques” that suggest specific ways to behave to get the results he needs to achieve for success. The coach suggested several tips to help John remain calm and clear thinking during confrontation situations. a. The coach suggested that John use a process for separating his emotions and the people from the issues causing the problem. b. In addition the coach informed John that he should consider using a “specific” reference document that would give him additional tips and techniques to try. c. John Doe said he would include these tips and techniques in his action plan. John said he would start his development plan this week. He also said he would schedule a time to meet with his Manager to discuss his plan and insure that it was in sync with his Managers goals.

**Rate the leader's overall preparedness of the coaching call on a scale of 1 - 6:**

**Was the leader prepared for the coaching call?** High Performance (6)

**Was the leader able to articulate the objective of the call?** High Performance (6)

**Was the leader proactive during the call?** High Performance (6)

**Did the leader demonstrate commitment to achieving the objective?** High Performance (6)

**Average Ratings: 6**