

The Six-Step Coaching and Feedback Process | Observer Checklist

As you go through this process, can you identify the Personality Type of the Employee? _____ Style

1) Setting the Tone: The meeting and opening statements

Did the manager:

- Offer statements of value? Yes No
- Clarify the performance expectations? Yes No
- Cite examples of the problem or the opportunity? Yes No
- Avoid fighting words such as “but” and “however”? Yes No
- Manage the employee excuses? Yes No N/A

2) Gain agreement using dialogue and understanding

Did the manager:

- Articulate a clear message as to the nature of the situation? Yes No
- Ask the employee questions and solicit their point of view? Yes No
- Help the employee understand the consequences of behavior (which includes the impact to the business and/or effect on the team)? Yes No
- Use open ended questions throughout this stage? Yes No
- Listen without interrupting? Yes No

3) Creating the Path Forward: Identifying the Solution

Did the manager:

- Ask the employee for their solution or ideas? Yes No
- Discuss the benefits and drawbacks if solution not viable? Yes No
- Help the employee identify other solutions? Yes No N/A
- Evaluate alternatives and jointly select the best? Yes No
- Ensure the solution was specific and consistent with our polices and fair to other employees? Yes No

4) Secure a commitment to the Path Forward

Did the manager:

- Secure a verbal commitment with the employee? Yes No
- Create an action plan and timelines? Yes No

5) Close the Meeting: The Last Step in the Path Forward

Did the manager:

- Summarize the process? Yes No
- Thank the employee and/or make them feel valued? Yes No
- Discuss follow up and accountability? Yes No

6) Follow Through: (Not applicable for Role-Play)

- Look for early successes to reinforce progress.
- Keep your own commitments.
- Hold the employee accountable.
- Continue coaching so it is a pleasant / growth experience.
- Document for future reference.

Other:

- What else did the manager / supervisor do well at in this case?
- Based on DiSC style, what motivators were used to enhance this meeting?
- What advice would you give the manager / supervisor for future reference?