



Coaching Job Skills: Action Plan Record Instructions

This document is the agenda for the coaching meeting and the record of the meeting between you and the team member. The form on pages 52-53 (office version); or pages 54-55 (industrial version) guides you through the use of the Skill Points you saw on the videotape and practiced in the workshop. The agenda will structure the meeting, helping you to give the team member the specific information that he/she needs to improve performance. The record will provide you with a document that, over time, will be useful in evaluating the effectiveness of your approach to using coaching job skills and will serve to indicate when a shift in emphasis may be called for.

Action Plan Record Directions

Use the **Coaching Job Skills** Action Plan Worksheet you prepared as your outline for the Action Plan Record.

Section 1 – During the meeting or immediately afterward, summarize your comments to the team member about performance area(s) in need of improvement.

Section 2a – During the meeting or immediately afterward, summarize how you demonstrated proper performance to the team member.

Section 2b – Record the team member's view of the situation.

Section 2c – Summarize your feedback to the team member after his/her practice of proper techniques.

Section 3a – Record the actions that you have agreed to and the target dates for completion. When you have accomplished the actions, note the results in that column.

Section 3b – Record the actions that the team member has agreed to and the target dates for completion. Be specific about the target dates. Do not use expressions such as "in a few weeks," "a couple of days," or "ASAP." When the team member has accomplished the action steps, note the results in that column.

Section 4 – Write the date you and the team member set for the status review. Sections 3a and 3b provide you with the agenda for the status review. When you select the date for the status review, consider both of your work schedules, as well as how long it will take to complete the actions.