

Employee Name: _____

Date: _____

Coach Name: _____

Employee Coaching Companion

The Omnia[®] Coaching Companion is used to track and weigh the steps of the coaching process:

1. OBSERVE CLIENT INTERACTION

Circle the number which applies:

a. Client Contact

Did the employee greet the client in a timely manner?

poor	unimpressive	ordinary	good	excellent
1	2	3	4	5

b. Communication

Observe verbal, tone, and non-verbal communication.

Did the employee exercise active listening? Did they communicate time frames, expectations, recommendations in a clear, concise manner?

poor	unimpressive	ordinary	good	excellent
1	2	3	4	5

c. Client Experience

Did the employee enhance the customer experience in a way that would invite the client to recommend your business to someone else?

poor	unimpressive	ordinary	good	excellent
1	2	3	4	5

d. Product Knowledge

Did the employee offer additional services based on stated and unstated client needs?

poor	unimpressive	ordinary	good	excellent
1	2	3	4	5

Were they able to communicate them clearly to the client and answer additional questions?

poor	unimpressive	ordinary	good	excellent
1	2	3	4	5

Were they able to determine additional needs based on client interaction?

poor	unimpressive	ordinary	good	excellent
1	2	3	4	5

2. LOOK FOR:

a. Did Wells:

- i. Observe employee communication style: include tone and non-verbal communication.
- ii. Was employee first to initiate client contact?
- iii. Were there proactive behaviors to enhance the client experience or increase the business relationship?

Notes: _____

continued>>>

b. Next Time:

- i. Only discuss 1-2 areas of development.
- ii. Prioritize the most critical area of development to discuss.
- iii. Assist employee in making goal to improve area of development.

Notes:

- 3. REVIEW PREVIOUS COACHING COMPANIONS FOR IMPROVEMENT.
- 4. KEEP ALL COACHING COMPANIONS CONFIDENTIAL.
- 5. USE COACHING COMPANIONS FOR PERFORMANCE EVALUATION COMPLETION.

For assistance, contact an Omnia Client Advisor:

800.525.7117

CSM@OmniaGroup.com

www.OmniaGroup.com

