
Performance Facilitator Coaching Guide



Manager [or coach's] Name:

Individual in the job:

Review Period:

Date of Print: Wednesday, 12 February 2003

Job Title: Account Executive

Job Description:

Sells products or services; develops prospects from current customers, referral leads, and sales/trade shows; contacts prospective customers to present information and explain available services; determines customer's needs and prepares proposals to sell product/services; reviews business trends and advises customers; makes sales presentations both one-on-one and for groups; prepares forms or agreements to complete the sale; evaluates costs and revenue of agreements to determine continued profitability.

Performance Facilitator

Competencies For This Position Include:

- Ability To Work Independently**
- Anticipation/Proactive Thinking Skills**
- Capacity To Take Accountability**
- Communication Skills**
- Customer Focus**
- Decision-Making Ability**
- Emotional Intelligence**
- Initiative**
- Sales Ability**

Please use the following rating scale to help evaluate the individual's responses.

Rating	Rating Standard
1 - Needs Correction	Individuals's responses contained very few of the target behaviors. Either the behaviors he/she discussed were not at, or even close to, the level indicated in the target behaviors, or the person did not give you enough information for you to have confidence that he/she has exhibited this competency at the level needed for success.
2 - Fully Competent	Individuals's responses covered some of the target behaviors, but not quite at the level that is ideal for that competency. Still, the quality of the person's answers leads you to believe that he/she would excel with some additional exposure, coaching and/or training. At the present time he/she is performing at a level that is fully competent for this job.
3 - Peak Performer	Individuals's responses contained many, if not all, of the target behaviors. His/her responses indicate well-developed skills which have lead to high levels of Job Performance. This individual's responses are of superior quality for this job.

Competency Details

Ability To Work Independently

Ability to work independently looks at an individual's capacity to perform their work with little or no guidance from others. This competency asks the question 'To what extent can you operate in a self motivating way and rely on your own common sense and judgment to achieve goals and targets (without necessarily referring to other people)?'

Target Behavior :

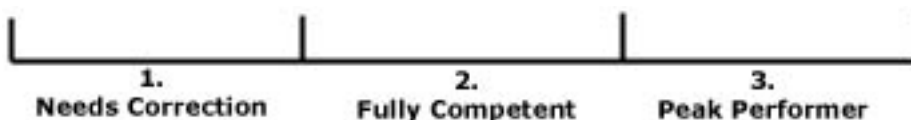
1. Drives self to complete work without expectations of monitoring or help; is resourceful and independent; anticipates roadblocks well.

Coaching Question :

Tell me about a project you worked on where you operated very independently. What did you like about this? What did you dislike?

2. Exudes a strong sense of self; is self-confident, yet humble; gives credit where credit is due; may work alone, but is not a loner.

Describe a tough assignment that you worked on alone.



Competency Details

Anticipation/Proactive Thinking Skills

Anticipation/Proactive thinking skills looks at an individual's ability to maintain a conscious awareness of events and situations around them and to take action to be ready when they see change on the horizon. This competency asks the question 'To what extent do you regularly reflect upon what might happen in the future and make small adjustments now to be as well prepared as possible?'

Target Behavior :

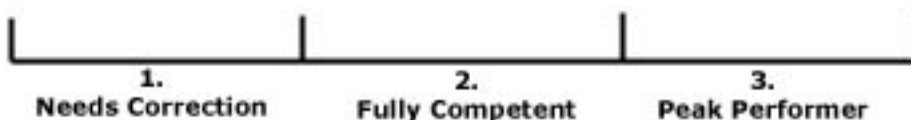
1. Identifies in advance how decisions that are made at the department level will impact operations within own area of responsibility.

Coaching Question :

Describe a higher-level decision you found out about that you felt would have implications for your area.

2. Identifies how own area of responsibility can successfully support and enhance larger plans and strategies.

Tell me about an idea you had that you believed would support, or enhance, a larger organizational goal, or strategy.



Competency Details

Capacity To Take Accountability

Capacity to take accountability looks at an individual's ability to take personal responsibility for his or her own behavior and avoid the temptation to 'pass the buck'. This competency asks the question 'To what extent do you stand up to be counted whenever it is necessary to do so?'

Target Behavior :

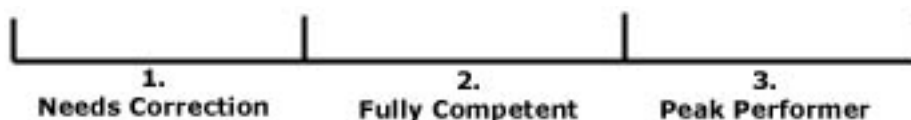
1. Doesn't take things personally; focuses on the issues.

Coaching Question :

Tell me about a time when you had to sit through some really hard feedback. How did you take it?

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2. Is able to manage demanding, complex, multi-stage projects; is able to develop business processes that incorporate accountability.

Describe one of the more complex projects you managed, one with several stages. How did you keep it on track?



Competency Details

Communication Skills

Communication skills looks at the extent to which an individual communicates with economy and clarity, and remains open to feedback to improve their communication skills in the future. This competency asks the question 'How well do you design and send verbal messages and attentively listen to people's responses in order to adjust your communications?'

Target Behavior :

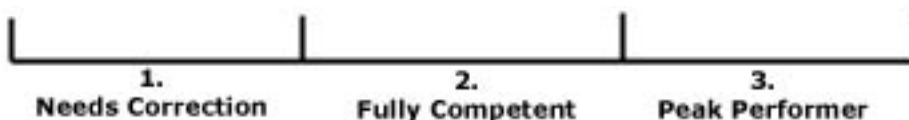
1. Understands the importance of keeping appropriate people informed; adjusts level, style, and pace of communication to audience.

Coaching Question :

Describe a process or project you worked on in which you had to keep people informed. How did you accomplish this?

2. Has a patient, non-threatening communication style that can be adjusted depending on the audience; is not condescending, and puts others at ease.

Describe a recent interaction you had with someone who was 'non-technical.' What did you need to communicate, and how did you do it?



Competency Details

Customer Focus

Customer focus looks at the extent to which the individual has an 'environmental radar' tuned to competitors, the market and customers to guide their day to day actions. This competency asks the question 'How well do you listen to external sources of information, and work across functions, departments and teams to help offer service excellence to customers?'

Target Behavior :

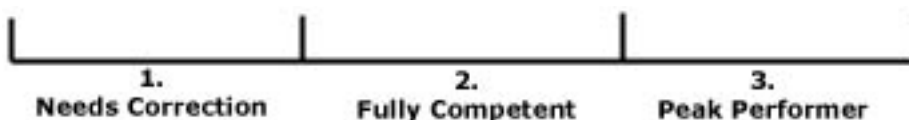
1. Works hard for 'win-win' outcomes, enjoys being helpful and strives to go beyond what is normally expected.

Coaching Question :

Tell me about a time when you feel you were able to exceed the customer's expectations in some way.

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2. Demonstrates courteous, responsive, and energetic behavior and language; goes 'above and beyond' to serve the customer well.

Give me an example of a customer complaint you handled recently. Tell me what you did.



Competency Details

Decision-Making Ability

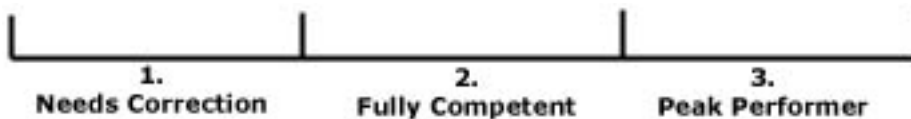
Decision making ability looks at how well an individual maintains focus on the results or goals that matter or are important and takes crisp and clear decisions that help themselves and others to move forward positively. This competency asks the question 'How well do you distinguish between what is important and make high quality decisions that yield the best possible results in the circumstances?'

Target Behavior :

1. Makes decisions in a complex environment, comprised of partial, often changing information and priorities.

Coaching Question :

Describe a decision you had to make with partial information.



Competency Details

Emotional Intelligence

Emotional intelligence looks at an individual's capacity to recognize, understand and harness their own feelings and the feelings of others positively as often as possible. This competency asks the question 'How intelligently 'in-tune' and appropriately aware are you of your own natural emotional reactions and of those around you to ensure that decisions and actions are positively balanced?'

Target Behavior :

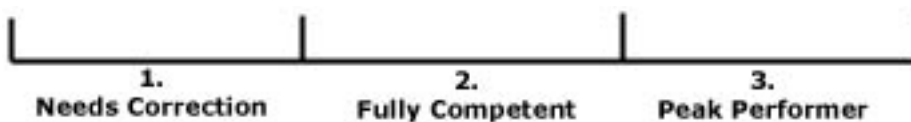
1. Is likely to seek deeper and more meaningful relationships at work.

Coaching Question :

Describe a relationship you have at work that you see as quite deep and rewarding at an interpersonal level.

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2. Is skilled at reading body language, voice tone, and eye contact.

Tell me about a situation in which you observed that the person you were communicating with was telling you one thing, but their body language told a different story.



Competency Details

Initiative

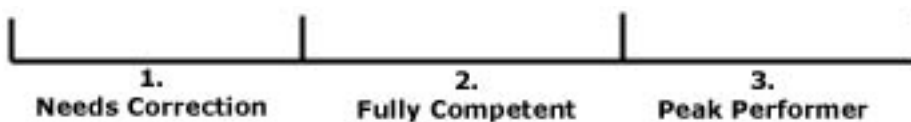
Initiative looks at an individual's capacity to think and act independently and take any necessary steps or action without prompting when circumstances demand that they do so. This competency asks the question 'To what extent do you try to think about what is happening around you and to think ahead as much as possible and take action by yourself today that may save time and effort by yourself or others tomorrow?'

Target Behavior :

1. Engages in continuous learning in order to improve work contributions.

Coaching Question :

Tell me about a time when you set out to learn something new in order to improve or increase your contribution.



Competency Details

Sales Ability

Sales ability looks at the extent to which an individual enjoys and excels at the sales role, promoting products and/or services, either inside or outside of the organization. This competency asks the question 'How effective are you at selling goods and services to others in a way that fosters goodwill and builds profitability?'

Target Behavior :

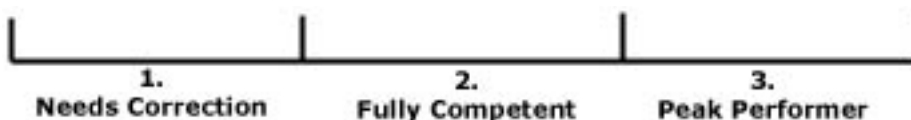
1. Knows how and when to switch styles or tactics; can do the soft sell, or just listen, well.

Coaching Question :

Tell me about a time when you were too aggressive in your approach . . . thinking back, what could you do differently next time?

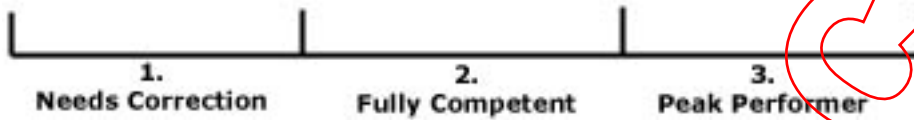
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2. Sells without even knowing it; is a natural salesperson.

Tell me about a time when you caught yourself selling, when that wasn't even your intent.



Overall Performance Rating

The individual's suitability overall:



Overall Evaluation:

Goals for the next review period:

Comments: