

# A New Tool to Improve Team Performance: “Coaching Reviews”

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Coaching Reviews are short performance reviews that can be done monthly or even weekly.



Performance reviews in most companies are done yearly as part of a benefit review. This is lazy and uncaring management. Management’s job is to improve performance, not yearly, but weekly and monthly. Management does this through coaching and training.

Training and coaching should be based upon objective criteria. Most reviews are too subjective rather than based upon whether the job got done or how well it got done. Job or department checklists, office or employment manuals, and of course, performance statistics should be referred to. Coaching based upon what the team member can *refer to in writing* helps them improve faster.

Good Coaching Reviews improve individual and team performance and morale. They can be an excellent tool to train staff. They are also used to keep in touch with each team member and let them know you know how they are doing and that you care about them. And, it gives you the opportunity to give them honest feedback on their performance. It can help keep everyone on their toes but in a friendly fashion.

Coaching Reviews also make obvious those staff that don’t want to improve or are better suited to work elsewhere. They give you a record of attempting to help them. If a team member isn’t improving after a few coaching sessions, don’t hesitate to make a change. We are all in the improvement business

They provide four essential functions:

1. **Two-way communication** - Seeking to understand and getting understood. This is empathetic communication that fosters understanding, rapport, and team synergy.
2. **Feedback**. Employees want to know where they stand with management. Let them know and give them praise or reprimand them for specific performance outcomes.
3. **Coaching**. Help them improve by giving them tips to support their good outcomes and correct their poor ones. This could also include role-playing, study assignments, etc.
4. **Monthly Goals**. Help them set their own goals—just a couple or so. Encourage them to stick their neck out, but make sure they are realistic. Tell them that you look forward to meeting them next time to see how they did.

## Procedure

These steps are done in a conversational manner. Not formal – friendly.

Explain the procedure to each employee before you start. The purpose is improvement through feedback and coaching

- 1. Be Prepared.** Review the team member's performance over the last period. Note 2-3 activities that they have improved on and 1-2 activities that need improvement. Base these upon items in their written department or job checklist and or statistics.
- 2. Schedule 10-30 minutes** for the coaching review with the team member. If they are new and need lots of coaching, 30 minutes weekly. And if they are doing great and are veterans, 5-10 minutes every month - or take them to lunch as a reward.
- 3. How Are They Doing?** Check in on how things have been going, generally. Get personal if appropriate. Be interested in how they are doing – in life and in the office. Try to understand what is going on from their point of view. Seek to understand. Ask questions as needed and make sure they feel you understand and empathize.
- 4. Go Over the Improved Areas.** Give feedback and praise - let them know how genuinely pleased you are with their good work. Ask how they can *keep it improving* and if they need any help. Give them tips and coach them as appropriate.
- 5. Go Over Areas for Improvement.** Give them feedback and lightly let them know you are unsatisfied with that specific outcome. (Don't be mean - a slight disapproval goes a long way.) Refer to written materials like their job checklist and statistics. Take up only one or maybe two items. Ask them what happened. Respectfully, keep asking until they see what happened. Ask them how they could have done it better. Refer them to procedures and coach them on how to improve. May need to set up an coaching/training time later.
- 6. Goals.** Have them set 1-3 goals for the next time period.

Repeat this frequently – daily and weekly with new team members, and every month or so with others. To be effective, they don't need to be too formal. You can have the team member keep notes, and you can as well. This can be useful in the future if you need to document your meetings.

You can also ask the team member to bring their job checklist and go over any tasks that they think should be improved upon. It is their sandbox!

Team members provide support for the doctors and clinical providers. The role of administration, leadership and management, is to support the team. How well they do their work is directly proportional to how well administration does theirs, from hiring to training to coaching.

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