Using Assessments
Business Basics Guide for Coaches

This guide will help you have a better understanding of how to use assessments in your coaching business. A primary focus of using assessments in business is about creating individual, intentional behavior change for personal and professional growth.

By using assessments, you will be able to coach your clients to:

Select the Right People and Onboard for Long-Term Employee Success

Create World-class Leaders

Create a Model Winning & Engaged Team

Create a Connected Team that Understands and Leverages their Strengths

Increase Sales

Increase Productivity

Reduce Employee Turnover

Each section will give you simple processes you can implement to work with your clients and their teams. At the end of each section, we will provide you with a suggestion of specifically-focused assessments to use in each of the categories.

Assessments 24×7
GLOBAL LEADER IN ASSESSMENT TECHNOLOGY

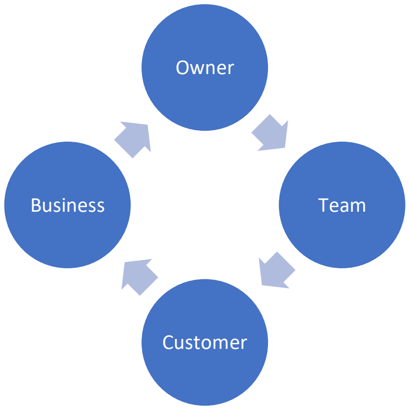
Contents

Understand the Basics

The aim of a successful business/organization is:

- To have the right people with the right skills in the right place at the right time as ambassadors of your business/organization
- To be sustainable and stay ahead of all costs of doing business (profitable) while maintaining a healthy cash flow

The cycle of business:



As the owner, your responsibility is your team. You need to hire the best people, provide them with the proper tools, and train them to use the tools to service your customers. In addition to the company tools, your team needs you to be their leader to inspire them, identify their needs, and award their successes.

When your team is equipped with the proper tools and strong leadership, you are creating a long-lasting, winning team. Your winning team can now take care of your customers and provide them with "WOW" customer service and a sense of delight. When your customers are delighted, they become repeat customers who take care of the business.

Creating Conscious Behavior Change

Creating conscious behavior change starts with an understanding of individual DISC styles. When you truly understand an individual's DISC style, you are able to coach them on personal development and professional growth. You can use the 'Potential Areas for Improvement' section of the DISC report (example below); each person will have specific areas of improvement based on their individual DISC scores.

Example from the Sample Report:

Everyone has struggles, limitations, or weaknesses. Oftentimes, it's simply an overextension of our strengths which may become a weakness. For example, the directness of a High D may be a strength in *certain environments, but when overextended, they may tend to become bossy. As you consider ways to continue to improve to be a better communicator, we recommend you focus on no more than two at a time, practice and strengthen them, and then choose another area to focus on and improve. Check the two most important areas you are committed to improve upon and transfer them to the Summary of Your Style page.*

Potential Areas for Improvement:

- *You set very high achievement standards for others, to the extent that some goals may not be achieved.*
- *You may become verbally impatient when things don't go as expected.*
- *You may frequently be argumentative when in disagreement.*
- *You can be a selective listener, hearing only what you want to hear.*
- *Your demanding attitude may alienate others who don't share your drive.*
- *You tend to be a one-way communicator.*
- *You may overuse threats to persuade or motivate others.*

Coaching Script: How to Create Conscious Behavior

Coach – "In reading each of these areas for improvement, what sticks out to you the most?"

Client – *"Being a selective listener, hearing only what you want to hear."*

Coach – "Excellent, and why does that stick out to you?" ***STOP and LISTEN to their answer***

After client answers -

Coach – "Thank you for sharing. I can tell that this is a very important area to work on for you to [*build your team and increase productivity*] in your business. Here is what I would like for you to do in the next two weeks - have a conversation with 5 team members and focus on Matching & Mirroring the conversation.

What that means is that you will repeat back matching or similar words that a team member will say. For example, the team member may say, 'one of my challenges this week is distractions.' You will say, their name – 'John, talk more about some of the distractions that become a challenge.'

Listen again. Then continue the conversation casually using the same method. Be cautious of mimicking and be aware of your tone as you want to be sincere with the person. The more you match, the more you retain and are PRESENT with the person you are speaking to.

After each conversation, I would like for you to take note of the conversation, specifically how you felt, what went well, and what can you do differently in the next conversation.

Do you have any questions on your action item?

"When we meet next, we will discuss your conversations and how they went. If, at any time, you are feeling uneasy to the point you are not able to complete this action item, please email or text me so we can discuss and talk through it together."

SIDE NOTE: *As a coach, match and mirror works well in your sales process, also.*

Sample - Client says*, "I don't have enough time to focus on the business" –*

You - *"John, you say you don't have enough time; talk more about how you spend your day"*

Sample - Client says*, "My main priority in my business is to grow."*

You - *"John, so, your main priority right now is growing your business. Talk more about what growth in your business looks like – is it financial growth, team growth, sales growth, etc.?"*

Here is a video on [Matching and Mirroring Your Prospect – The Sales Conversation]

Improve Hiring and Selection

The right person in the right job is vital. A bad hire is not only costly but also can be detrimental to an organization. Using assessments, you can identify the strengths and potential risks of job applicants before the interview and make thoughtful, scientifically-informed decisions.

The key in selecting the right talent is to leverage a selection process. A talent selection process is designed to streamline the steps required and is a standard for qualifying and interviewing career seekers. The plan acts as a timeline of actions to find the right talent while minimalizing interruption for the company.

If a company or organization already has a talent selection process, ask the following questions:

A. Does your current process achieve the desired goal?
B. Was the position marketing well and was the desired applicant goal achieved?
C. Is the new team member meeting or exceeding their first 90-day goals?
D. What assessments do you use within your talent selection process?
E. On a scale from 1-10, how effective is your current talent selection process?

If the company answers yes to all of the above, explore the details of the current process and implement or encourage them to consider using the HireSense product to quickly identify every candidate's:

- **Behavioral Style**
- **Motivational Style**
- **Thinking Style**

If a company answers no to some of the questions, work with your client to develop a talent selection process, including:

A. **Identify** Hiring Need
B. **Prepare** Job Description & Desired Skills

C. **Develop** a Recruitment Marketing Plan & Budget
    a. Sourcing – Job Ads, Referrals, Past Candidates
    b. Generate Brand and Industry Awareness
D. **Screen**
    a. Application – Online or Manual
    b. Use of Assessments
    c. Assess Skills – tech, writing, marketing
E. **Interview**
    a. 1-2-1 Interview
    b. Group Interview
    c. Behavioral & Situational Questions
F. **Offer**
G. **Hire & Onboard** Process (See next section)

Focus Assessments for use in Talent Selection

A. DISC Self
B. Motivators
C. HireSense
D. DISC Coaching Target Application Guide

Induction for New Team Member

The recruitment process needs to be complemented with a powerful **induction** to get the new team member up to speed much faster. These important functions should be a collaborative effort with the HR Department and Management team. When you have a full understanding of the recruitment, induction, and promotion processes, the company will end up onboarding the right person in the right way to ensure the greatest effectiveness as quickly as possible.

A. New Team Member Package/Orientation Sample

    a. Company Information, Vision, Mission, Culture of the Company
    b. Organizational Chart
    c. Team Member Handbook
    d. Full Assessment Reports
    e. Job Description
    f. Role Standard Operating Procedures
    g. Key Performance Indicators (KPIs)
    h. Annual, 90-Day, Monthly, Weekly, Daily Goal & Achievement Plan Templates
    i. 90-Day Personal Development Plan
    j. Company & Management Meeting Schedule
    k. Individual Tax and Payroll Information Forms
    l. Team Member Meet and Greet Schedule

The First 90 Days for Management

To create competent and productive people, you will need to use the full version of the assessments to build proper development plans.

A. **Review Full Version Team Member Assessment Reports** for building an Individual Personal Development and Goal/Achievement Plan. You can download Debrief Guides to use as you build out these resources as well as the tools in your Resource Center.

   a. **DISC Report** – Use this report to create a **Behavior Action Plan** –
      This is not a "To-Do" List, rather a plan of action to achieve goals, build confidence, inspire personal growth, and reduce problem behaviors
      i. *Example – You may frequently be argumentative when in disagreement*. "Simple Behavior Plan - In the next 90 days, when a disagreement arises, I would like you to be conscious of and focus on your response to any disagreements. Listen carefully and develop a plan to work it out with the team member"
      ii. Have your team member review the entire report, complete the exercises, and answer the following after reading the report:
         1. In reading this report, what did you agree/disagree with?
         2. In reading this report, what questions do you need answered?

   b. **Motivators Report** – Use this report to understand the motivational orientation of your team member. This will help you and your team member understand what motivates them. Superior performance is possible when motivations are satisfied to drive passion, reduce fatigue, and inspire.
      i. Use the motivational profile to create the goals within their role
      ii. Use the motivational profile to reward and create a bonus structure *Some team members just want a gift card or an extra paid day off
      iii. Optional: use the Motivators Coaching and Questions document to help build the action plan

      REMINDER - Motivation influences behavior and action in ideal circumstances, but sometimes we can't do what we want to do for a variety of reasons.

   c. **Critical Thinking (HVP) Report (part of HireSense only)** – Use this report to understand potential limitations, uncover blind spots, and reveal problem-solving skills.

B. **Planning** – Planning is about creating accountability and discipline to achieve the goals of the development plan and the business/organization. Each team member should have the following:
   a. Annual Plan
   b. Quarterly Plan – everything in the plan should meet the annual goals
   c. Monthly Plan – everything in the plan should meet the quarterly goals
   d. Weekly Plan – everything in the plan should meet the monthly goals
   e. Daily Plan- everything in the plan should meet the weekly plan goals

   The most important is the discipline of the daily goal - if the daily goal is not achieved, the weekly goals are not achieved, and so on.

C. **Management Meetings**
   a. Management meetings should be congruent with the planning system.

Model Team Building

Creating a winning and engaged team is about consistency in the organization. When consistency is implemented, you can create an engaged, productive, and competent team. It is essential to know which styles are going to work best together and what potential conflicts may arise. Build teams based on compatible skills, traits, and styles for maximum efficiency and improved culture. Leverage diversity and plan for ways to overcome miscommunication.

To effectively create a winning team and retain a team member, the first thing to understand is the difference between **Leadership** and **Management** and the definition of an **Ambassador**.

> ***Leadership*** *creates passionate and focused people.*
>
> ***Management*** *creates competent and productive people.*
>
> *An* ***Ambassador*** *is someone who is beyond satisfied – one who is "delighted" every day and will speak highly of and endorse the company*

"Customers will never love a company until the employees love it first." – Simon Sinek

To create a long-lasting, winning team requires a great foundation:

- Strong Leadership
- Communication & Planning System

Strong leadership knows when to lead and when to manage. A strong leader recognizes when to give guidance, encourage, motivate, inspire and when to direct and dictate and to challenge their team to be efficient and productive in their role. Both leadership and management are important to build a culture of ambassadors who not only do the work effectively, but represent the company in a way that positively impacts the company, market, and industry.

Communication & Planning System

To create passionate, focused, competent, and productive people, it is important to have a **communication and planning system.**

Setting Up the System:

A. Implement the planning process (90 Days for Management, Section B, previous page)
B. Implement Management Meetings (90 Days for Management, Section C, previous page)
C. Provide each team member with a framed image of their DISC graph for their desk. When team members stop or pass by the desk, each team will know how to begin to communicate with each other. Remind them to watch for adapting and shifting of style.
D. If your organization requires a name badge, add the DISC graph or blend to the individual name badge.

Quarterly Team Building Day (1 or 1/2 day)

Quarterly Team Building days help create tactical plans with goals for each team member that are educational and fun. Quarterly days should consist of:

A. Education Sessions
B. Planning Sessions
    a. Review previous 90 Days Discussion
        i. Wins for Quarter (Goals/Milestones achieved)
        ii. Learnings for Quarter (Areas of improvement, goals not achieved)
    b. List goals for the next 90 days
        i. KPIs (Key Performance Indicators)
        ii. Actions/Tasks to achieve the goal with specific timelines
    c. Team Building Exercises
    d. Resources
        i. Team Building Exercise tools
        ii. Group Graphs
        iii. Team Wheels
        iv. Collaboration Examples

Team Engagement Opportunities

A. Weekly / Monthly Activities
    a. Weekly Bagels
    b. Birthday Cake / Card
    c. Monthly Team Lunch

Focus Assessments for use in Model Team Building

A. DISC Self
B. Motivators
C. DISC Collaboration reports (for comparison of 2 individuals)
D. DISC Team Dynamics (for team)
E. DISC Team Wheel
F. Motivators Team Wheel
G. DISC Coaching Target Applications

Create Connected Teams

Build effective, connected teams in an environment of coachability and transparency by embracing how EIQ and behavioral and emotional expression impact interpersonal relationships and business success.

Build Connected teams

To create a connected team, you must first develop the systems to create a Model Team (see previous section on Model Team Building)

A. Identify SWOT for each team member
B. Let your team members be heard
C. Inspire team members to spend time together outside of work by hosting after hours activities
    a. Company Picnics/ Anniversary
    b. Retreats/ Reward Incentives
    c. Office Happy Hour
    d. Potluck Dinners
    e. Game Nights
    f. Bowling
D. See Increase Productivity below in Section E

Using Emotional Intelligence to build connected teams

Emotional Intelligence can be developed by creating greater awareness and skills that will impact the workplace culture. EIQ can be used to create positive behaviors and healthy interactions with awareness of emotions (both self and others).

Emotional intelligence is often approached through communication, leadership, workplace conflict, diversity, and workplace harassment training and workshops. At the individual level, it can be developed through coaching, performance appraisal, and career development or high-performance initiatives.

As leaders, we look for common behaviors as the ultimate indicators for workplace morale and individual emotional maturity, including **Positive Observable Behaviors (POBs)**.

POBs are behaviors that, over time, build trust, productivity, and improved internal and external customer relations. When considering POBs, we first must agree that:

A. We can improve our workplace interpersonal dynamics and culture
B. We can improve acceptance and diversity through understanding others

Focus Assessments for Creating Connected Teams

A. Emotional Intelligence – Self and 360 reports
B. DISC – Self and 360 reports
C. DISC Coaching Target Applications
D. DISC Service Target Applications

Create World-Class Leaders

Leadership

Building a leadership team of forward-thinking, engaging, supportive, and effective leaders isn't always easy, and ensuring they continue to be the best leaders they can be for their teams requires **constant awareness** and **continued focus** on honing their skills. Be sure to get familiar with the Leadership and Management section on Model Team Building already shared.

A. Implement the planning process (90 Days for Management, Section B).
B. Engage in leadership training
C. Practice personal and professional discipline
    a. Implement calendar of meetings
    b. Start / End meetings on time
    c. Meet deadlines
D. Empower & Inspire team
    a. Delegation of tasks and role responsibilities
E. Emotional Intelligence – Before leaders can start creating a winning, connected team, leaders must focus on themselves through:
    a. Self-Recognition – Identifying/understanding your own emotions
        i. How do you generally "do" life?
        ii. Is your glass half empty or is your glass half full?
        iii. Are things in your control or is your world determined by fate?
    b. Self-Management - Managing our own emotions
    c. Social Recognition - Perceiving and understanding the meaning of others' emotions
    d. Social Management - Managing others' emotions and responding appropriately

Developing others

A key activity for all leaders is to bring out the best in their teams. Effective leaders are good at this, whether doing it consciously or unconsciously. They recognize that the more capable and skilled their teams are, the better they will all do!

In what ways do you, or your leaders develop others within the organization?
This list does not cover all of the options, though using a variety of these will improve people, both in capability and confidence.

Method/approach	**Frequency**			
	Often	***Sometimes***	***Rarely***	***Never***
Coaching themselves				
Delegation				
Sending to training programs				
Managing or Contributing to Projects				
Shadowing				
Setting examples – demonstration				
Mentoring				
Encouraging self-study				
Other				

Focus Assessments for Leadership

A. DISC Self + Leadership Target Applications
B. Leadership Effectiveness 360
C. DISC 360
D. Emotional Intelligence
E. Emotional Intelligence 360
F. DISC Coaching Target Applications

Managing Up & Accountability

The direct supervisor is the most important relationship in one's power base. And sometimes that position requires a different approach to leading. By allowing your team to Manage Up, you can find greater effectiveness and productivity.

A. Guide and Allow your team to:
    a. Make it easier for you to do your job
    b. Be proactive and provide solutions
    c. Be flexible and available to take on anything
    d. Be enrolled into and embrace the mission
    e. Understand the company's goals
    f. Own their role

Many top performers are lousy at managing the people who report to them but masters at managing up; however, they may not be consciously and proactively working at it.

To help them:

A. The process:
    a. Use data from the 360-degree assessment
    b. Work with your client to assess and improve the relationship

B. The Four Keys:
    a. Perform
    b. Make life easier for him or her; provide leverage
    c. Help them succeed and look good
    d. Be aprroachable

Focus Assessments for Managing Up & Accountability

A. HireSense
B. DISC 360
C. EIQ 360
D. Leadership Effectiveness 360
E. DISC Coaching Target Applications

Increase Productivity

Measure performance and examine critical companywide issues by identifying, with scientific accuracy, the gaps across the organization's key performance areas including: operations & strategy, business development, people, culture, leadership, execution, and mission.

Productivity occurs when an individual or organization grows and achieves greater success with the least effort, time, and wasted resources.

This definition takes into consideration several elements:

- reduced team member turnover
- high level of team member satisfaction and empowerment
- profits that can sustain the organization's continued growth
- effective communication throughout the organization as well as in the marketplace
- well-trained and motivated team members throughout the organization
- innovative product development and a sensitivity to what consumers want and need now, as well as what they will want and need in the future
- leadership and vision
- the management team in touch with the reality of the marketplace, as well as the internal issues within their organization
- clear, established corporate direction communicated throughout the organization
- personal and corporate accountability at every level
- definition of what success is for that organization
- commitment to the health of the community (whether that community is the provincial/state, national, or global population)

To improve sales, management, or overall organization productivity
There is not one simple answer! The solution must match the concern. The list above may not include all of the issues worthy of consideration when you evaluate overall organization productivity and effectiveness, so it's essential to consider:

- team member, customer, and market loyalty
- your management styles
- your corporate culture
- communication patterns and systems
- your corporate direction/vision/prime focus
- competence levels of your team members
- your competitive posture
- the perception(s) of your organization in the marketplace (vendors, customers, competitors)
- attitudes and perceptions of your organization by your team members
- your commitment to team member training and development

How To Increase Productivity

A. Implement the planning process (90 Days for Management, Section B).
B. Implement management meetings (90 Days for Management, Section C).
C. Assess all team members at least once every year

D. Assess the gaps in the key performance areas of the business
E. Use Emotional Intelligence to build productivity
   a. Improve workplace interpersonal dynamics, recognizing and valuing Emotional Intelligence:
      i. Self-Recognition – the ability to read one's emotions and recognize their impact while using gut feelings to guide decisions
      ii. Self-Management – involves controlling one's emotions and impulses and adapting to changing circumstances
      iii. Social Recognition – the ability to sense, evaluate, and react to others' emotions while understanding social networks
      iv. Social Management – the ability to inspire, influence, and develop others while managing conflict
   b. Increase job satisfaction
      i. Happy workers are generally more productive workers, but:
         1. General attitude is a poor predictor of specific behaviors
         2. Job performance affects satisfaction positively only when rewarded
         3. Effect is strongest in complex jobs with greater team member influence on performance (e.g., limited in assembly lines)
   c. Increase team member involvement
      i. Team members feel like a contributing part of the company
      ii. Involvement demonstrates trust and value
   d. Decrease work overload and task stressors
      i. Remove task control over how and when tasks are performed
   e. Manage work-related stress
      i. Minimize or remove
      ii. Change perceptions and realities
      iii. Provide support
      iv. Manage stress with plans and accommodation to/through life changes

Focus Assessments for Increasing Productivity

A. DISC & Motivators Combination
B. Emotional Intelligence
C. 360 Feedback Assessments
D. Organizational Development – *with clear results for each of the Five Disciplines for Exponential Growth: strategy, business development, people, execution, and mission*
E. DISC Coaching Target Applications
F. DISC Service Target Applications

Increase Sales

Teach your sales team powerful behavior observation skills that work, applying them in an effective sales cycle to convert the right prospects into customers and build engagement in your sales training. Help your team see their own sales strengths and development areas and focus on going from good to great in their interactions with others.

Understanding Sales with your client

- Definition of Selling – professionally helping others to make decisions in their buying process
- Great salespeople Have A PURPOSE – Focus on the prospect, not your product
- Salespeople must have a Sales Growth Mindset:
    a. Be CURIOUS – a salesperson's most powerful tool is asking questions
    b. Be a RISK-TAKER – pricing, incentives
    c. Be COMMITTED - to the plan, prospecting, nurturing, follow up,
    d. BE DISCIPLINED – follow the process, document, follow-up, create a "To Achieve List" not a To Do List, execute daily habits, "Eat the Frog" (do the worst thing first), eliminate distractions
    e. Be CONNECTED & ENGAGED – create an emotional connection with your prospects and REMEMBER WIIFM – "What's in it for me?"
    f. Continue to LEARN – product, research, surveys, book, magazines, blogs
    g. ASSUME THE SALE

Creating a Customer Relationship Process

People buy from people they know, like, and trust:

- **Initiate** – Target>Interest>Needs
- **Develop** – Engaging Conversations and Presentations>Overcoming Objections>Close>Relationship
- **Amplify** – Post-sale follow up>What else can you Add>Consistent and ongoing relationships (CNE – Critical Non-Essentials – birthday cards, VIP notifications, anniversary, etc.)

Creating an effective sales cycle to convert the right prospects into customers using DISC

DISC is designed to be a simple, practical, and applicable tool for building mutually-beneficial and effective communication – a key to Sales effectiveness. Understanding observable behavior and emotion is the foundation of self-awareness and connecting with others in a way that allows us to be intentional in our interactions, adapting to what is needed in any environment, situation, or relationship.

While DISC is useful in any circumstance or relationship, it may be helpful to have a deeper understanding of how to apply DISC in targeted situations or scenarios, like a sales relationship. Using what you know, you can immediately leverage the DISC information to find the most appropriate and effective communication strategies in selling.

DISC Sales provides specific insight into using DISC in sales and gives suggestions for interacting **with** different DISC styles and **from** different DISC styles in the five stages of the selling cycle - Connecting, Assessing, Solving, Confirming, and Assuring.

Here are some bullet points to help you get started:

- Have a clear understanding of your Target (Customer Persona)
- Take them on a journey to envision what the sale will do for them
- Have a Well-Defined Sales Process – Review the DISC Sales Target Applications
    - Building Rapport Throughout the Selling Cycle
    - Maintaining Rapport in the Assessing Needs and Wants Stage
    - Maintaining Rapport in the Solving & Collaborating Stage
    - Maintaining Rapport in the Confirming Stage
    - Maintaining Rapport in the Assuring Stage
    - Building a Welcome Pack for the new customer
    - Sample documentation to include in the above steps
        - Bio & Reasons WHY to choose you
        - Case Studies, Testimonials
        - Sales Scripts for each step
        - Company Information Sheet w/Vision, Mission, Core Values
        - Information Gathering Sheets
            - Questionnaires
            - Surveys
        - Whitepapers

    - NOTE: When you speak to your prospect, **it is about them**. When you get off the phone, **it is about them**. The more they read, watch, and listen to you and the value and impact you will have in their life and their business, the better!

        - *SCRIPT - Ms. Client, it was a pleasure speaking with you today and learning more about your commitment to growth in your business and life. We have scheduled next Tuesday at 3:00 pm to continue our discussion about your goals. To prepare for the meeting, I will be sending you more information on how I work with clients. In this email you'll find my bio, 2 case studies, and a questionnaire. Please take a few moments to read my bio and case studies, and fill out the questionnaire, so that I can prepare for our meeting. Would Monday by noon work for you to complete those items?*

    - NOTE: Track and Measure conversion at each step of the process

- Invest in a proper CRM (Hubspot, InfusionSoft, Zoho, Salesforces, Pipedrive)
    - A CRM will…
        - Streamline prospect contact to increase sales
        - Increase customer engagement to improve customer retention
        - Streamline sales funnel
        - Automation & Track marketing campaigns
    - NOTE: There are a lot of CRMs that are ONLY sales process oriented or marketing platform only.

- Example:
  - Microsoft Dynamics – sales process ONLY, doesn't have true capabilities to send out mass marketing
  - Mailchimp - marketing platform only, cannot take a prospect through a sales process

Setting Goals

USE the **SMART, PURE, and CLEAR** system to guide strategy and create noteworthy Performance Goals:

- SMART
  - Specific
  - Measurable
  - Achievable
  - Results-Oriented
  - Time Framed
- PURE
  - Positively Stated
  - Understood
  - Relevant
  - Ethical
- CLEAR
  - Challenging
  - Legal
  - Environmentally Sound
  - Appropriate or Agreed upon
  - Recorded

Improving Presentations

- Do the research
- Provide the customer with upfront information 2 days before the presentation
  - See previous section on Creating an Effective Sales Cycle
- Tell a story
- Be confident
- Less is more – Less Text, More Visual
- Get in the ZONE – right mindset

Focus Assessments for Sales

A. Sales IQ
B. Sales IQ Team Report
C. DISC Self + Sales Target Applications
D. DISC Coaching Target Applications
E. DISC Service Target Applications

Reduce Employee Turnover

Ensure team member needs and wants are met in a way that increases satisfaction, happiness, and engagement, and helps them feel like what they are doing makes a difference in a way that they value:

- See Previous Sections:
    - Induction of New Team Member
    - The First 90 Days for Management
    - Model Team Building
    - Create Connected Team
    - Increase Productivity

- Understand the model of motivation
    - Organizational Variables
        - Organization policies
        - Working conditions
        - Job opportunity
        - Salary
        - Job content
        - Systems, Tools, Facilities
    - Interpersonal Variables
        - Relationship with manager
        - Involvement in decisions
        - Relationships with team members
        - Responsibilities and Accountabilities
    - Personal Variables
        - Creativity
        - Learning
        - Fulfillment
        - Confidence
        - Aspirations
        - Hope
        - Recognition
        - Status
        - Advancement

- Creating a Path to Peak Performance
    - The ‘what to’ – Having clear, worthwhile targets
        - The framework
            - Job purpose
            - Key results areas
            - SMART goals of success
        - Non-task goals
        - The Hot Stove Principle
    - The ‘want to’ – Being motivated to achieve
        - Job design

    - Job placement
    - Motivation
  - The ‘how to’ – Being competent to achieve and confident about achieving
    - Training
    - Experience
    - Importance
    - A learning environment
  - The ‘chance to’ – Being able to achieve
    - Tools and equipment
    - Work systems and procedures
    - Time, information, and other resources
    - Team Support
    - ‘Acts of God’ and personal problems
  - The ‘led to’ – Having effective leadership and guidance
    - Self-Esteem
    - High Standards
    - Challenging Goals
    - Proactive
    - Focus
    - Interpersonal Skills
- NOTES:
  - Keep open lines of communication between the team and the line manager/management/leadership
  - Communicate information from management to the team
  - Communicate unresolved issues, concerns, and problems raised by the team/team members to leadership, and follow-up to ensure action is taken
  - Communicate unresolved issues, concerns, and problems, raised by the line leadership related to the team/team members, and follow-up to ensure action is taken

Focus Assessments for Reducing Employee Turnover

A. DISC
B. Motivators
C. EIQ
D. Organizational Development
E. DISC Coaching Target Applications

	Talent Selection	Onboarding	Model Team Building	Create Connected Teams	Create World Class Leaders	Manage Up	Increase Productivity	Increase Sales	Reduce Employee Turnover
DISC	✓	✓	✓	✓			✓		✓
MOTIVATORS	✓	✓	✓				✓		✓
SALES IQ								✓	
SALES IQ TEAM REPORT								✓	
DISC TEAM DYNAMICS			✓						
DISC TEAM WHEEL			✓						
MOTIVATORS TEAM WHEEL			✓						
DISC COLLABORATION			✓						
EMOTIONAL INTELLIGENCE				✓	✓		✓		✓
EMOTIONAL INTELLIGENCE 360				✓	✓	✓	✓		
HIRESENSE	✓	✓				✓			
ORGANIZATIONAL DEVELOPMENT							✓		✓
DISC 360				✓	✓	✓	✓		
LEADERSHIP EFFECTIVENESS					✓	✓			
DISC TARGET APPLICATIONS									
SALES								✓	
SERVICE				✓			✓	✓	
LEADERSHIP					✓				
COACHING	✓	✓	✓	✓	✓	✓	✓	✓	✓