

Answer Sheet for

Student Name: _____

Study and Assignment Guide

Class 5. Goal Driven Procedures and Policies *and* Improving Individual Performance

Hi Goal Driving Managers!

Class 5 is a vital section of your course.

Coaching is what you do! Improving your team members, improving the team, improving the business so that we can improve our patients (peeps, customers, clients, members, gente!).

Coaching Reviews improve communication and focus on what is important -- the goals. It helps your team improve. On the other hand, it can expose situations where employment is not working. You both can calmly realize that "it just isn't working out." It sorts things out in a hurry with little or no drama! And, it can be, and should be, fun. And also challenging!

If you don't finish in the next few days, it can carry over till next week. Study the material and give your best on the exercises with your training partner and your doctor.

Have fun with it! See you soon.

Ed

_____ Post a Win

_____ Post a Tip

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A. Read Goal Driven Principles: Read the *Goal Driven Principles* and consider how they apply to your office.

- | | |
|---|-------------|
| 1. #7 <i>Communication</i> | DONE: _____ |
| 2. #8. <i>Collaboration and Self-Organization Works Better.</i> | DONE: _____ |
| 3. #9 <i>The Bridge to Your Goals.</i> | DONE: _____ |
| 4. #11. <i>Keep it Simple, Make it Simpler</i> | DONE: _____ |
| 5. #19. <i>Roles</i> | DONE: _____ |

B. Read Articles. (Find in References)

1. **Coaching Review**
2. **Inculturation**

C. Videos.

1. Watch the video *Green and Clean* – by Steven Covey (4 min)

<https://www.youtube.com/watch?v=wFAaFLP4tsU> DONE: _____

2. Watch the video on Job Checklist by Ed Petty (11 min.) DONE: _____

3. Watch the Coaching Review demonstration by Ed and Linda DONE: _____

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1. Read Chapter on Stage 3 (Pages 141-174). (Optional)

DONE: _____**E. Study questions.**

1. What is the purpose of an employee manual and practice playbook?
2. What is the relationship between policies and procedures and goals?
3. Name 2 essential criteria in hiring a new employee.
4. What is the difference between a specialist role and a team member role?
5. What is “inculturation,” how can you apply it, and why is it important?
6. Mockup a simple job checklist for a minor job at home. For example, emptying the garbage, washing the dishes, or making the bed. Please fax it back. (Pro tip: Watch what it begins with!) **DONE:** _____
7. What is Self-Determination Theory and how you can use it to improve team member performance? **DONE:** _____

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Coaching Reviews. This is an important exercise. Work with your training partner on this. As the employee being coached, try to be authentic. Discuss how it went afterward with your training partner and how you might apply this in your office.

Do 2 coaching reviews with your training partner. Pick what to praise and reinforce, what to reprimand, and what to train on. **DONE:** _____

1. _____ Your training partner is a front desk assistant who excels at answering the phone but struggles with scheduling.
2. _____ The second instance, your training partner is in charge of patient accounts and does a good job at filing the claims but does poor follow-up. She is also not good at patient financial consultation. Do you work on both now? Or pick one to work on? How are you doing to improve her performance and help her WIN?

At our next meeting, tell the class how it went.

DONE: _____

G. Teach your Clinic Director:

1. Ensure your Clinic Director has their Study and Assignment Guide! Please provide them with copies of the two articles for them to study. Help them complete their checklist, and once completed, please fax it back to us. **DONE:** _____
2. Ensure your Clinic Director has a copy of this Study and Assignment Guide. **DONE:** _____
3. Explain to your Clinic Director the importance of Job Checklists and why they should begin with goals first. **DONE:** _____
4. Explain to your Clinic Director how to do a Coaching Review, why to do it, and your plan to implement it. **DONE:** _____
5. Have them do a coaching review on you! **DONE:** _____

(Optional: How's your exercise program?)

Share Session Completed with _____

Clinic Director Briefing. Wow! Our manager did a great job briefing me on the material they learned and how to use it. I also asked her questions, and they gave intelligent answers!

Student Name: _____ **Clinic Director: Initial/signed:** _____

Please fax this checklist back to us when it is completed. Thanks!