

125 WAYS TO USE YOUR COACHING MEETING

The core purpose of our coaching meeting is to review action plans from our initial assessment, strategy, or planning meeting and **develop a topic** to focus on for your subsequent coaching meetings. These private coaching meetings also serve as a good time to discuss how business issues are impacting you personally and professionally.

These meetings also serve to help me become more familiar with the complexities and fine points of your business, industry, or practice. This allows me to ask better questions about your plans and issues.

There are times, however, when you may not have any major issues, or are dealing with an issue that has a long-time frame and doesn't need to be revisited every coaching meeting. At these times, you can consider other ways to use your coaching meeting.

I'm sure these ideas will generate a few more possibilities for you.

Human Resources

1. Develop a delegation plan.
2. Review internal and external communication policies
3. Develop interview questions for a planned new hire.
4. Develop key accountabilities for a position
5. Benchmark a position using online tools/ assessments.
6. Review time management issues and set goals for time management
7. Do a climate survey with the management team.
8. Interview a prospective employee.
9. Review your personnel manual.
10. Have DISC profiles done and reviewed for key team members.
11. Analyze turnover by manager or job classification.
12. Write a help-wanted ad.
13. Review job descriptions or performance review forms.
14. Compare wages to area averages.

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15. Review your hiring and orientation process.
16. Discuss your professional training plan/needs for team or self.
17. Develop an employee survey.
18. Review risk areas and develop action items such as in harassment or email policies and training
19. Develop team-building exercises
20. Develop an interviewing procedure for managers and supervisors
21. Develop written termination plan
22. Develop an exit interview for exiting employees
23. Review non-disclosure, confidentiality and non-compete agreements
24. Discuss key-person insurance needs
25. Focus on your work/balance
26. Develop your leadership skills
27. Fine-tune your communication skills

Strategy

28. Review your website and discuss how it fits into your overall strategy.
29. Develop your personal quality of life measurements.
30. Review your company mission.
31. Develop a 360° management effectiveness survey.
32. Define your Strategic Driving Force.
33. Develop your personal strategic plan.
34. Compare your recent actions to your business plan, and to your strategic driving force.
35. Review your vision statement.
36. Do SWOT analysis
37. Work on your vision statement
38. Develop short term, mid-term, or long-term goals
39. Review action plans
40. ID all your competitors and their Features and Benefits vs. yours
41. Work on an international strategy

Marketing and Sales

42. Fine tune sales or presentation skills
43. Develop a social media strategy
44. Investigate an issue or competition on the web.
45. Track productivity by salesperson or product line.
46. Develop a customer survey.
47. Discuss target customer groups and market segments.
48. Review your marketing or sales materials.
49. Develop sales tracking or reporting methodologies.
50. Develop plan tracking methods
51. Review your sales incentive plan.
52. Discuss Customer Relations Management (CRM) needs and systems
53. Develop prospecting strategies
54. Develop Follow-up strategies
55. Work on your sales plan
56. Work on your marketing plan
57. Develop a networking plan
58. Analyze where you are falling short in the sales process
59. Work on closing strategies
60. Develop a Word of Mouth Plan
61. Develop a Nurture Marketing program
62. Discuss Qualifying buyers
63. Plan a tradeshow
64. Develop a market research program
65. Develop your product/services Features and Overt benefits
66. Discuss whether niche marketing might work better for your business
67. Review the image you are trying to convey to the marketplace
68. Review customer's buying habits or trends
69. Discuss potential new product or service opportunities
70. List potential reasons why potential customers do not do business with you

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71. Discuss promotional plan
72. Discuss how to implement ROI on marketing tactics
73. Develop your 30-second verbal commercial
74. Review sales presentation material
75. Discuss weaknesses in the selling process
76. Develop a written referral program
77. Discuss tracking of the numbers of people in each stage of the sales pipeline and the implications
78. Develop a sales contest for sales force
79. Develop a plan to maximize repeat business
80. Develop a customer appreciation program
81. Work on an international marketing plan

Financial

82. Review your financial statements, comparing them over the last three years.
83. Compare your financial performance to national averages.
84. Do a line item examination of last year's expenses.
85. Compare payroll from 2 years ago to today, by both department and employee.
86. Examine expense and profitability trends.
87. Develop financial analysis standards, such as average order or customer size.
88. Review your current financial reports for possible improvements in the usefulness of the information.
89. Develop next years financial goals
90. Develop a budget
91. Develop a sales forecast
92. Analyze the % each customer and market represents to your business
93. Analyze the amount of new business you are obtaining and tracking of where it comes from.
94. Analyze lost business and the reasons for each loss
95. Review spending by department as a percent of sales and compare to industry averages
96. Review early payment options to improve cash flow or to save you money

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97. Develop a written AR tracking, aging and collections policy
98. Review receivable turn times and trends
99. Develop a cash flow forecast
100. Review time from completion of work to billing and develop a policy or procedure
101. Review break even point and incremental profit margins
102. Develop a barter plan

Operations

103. Meet with your second in command to discuss the issues he/she sees in the company.
104. Invite me to sit in on a management or staff meeting to critique its process.
105. Complete a business/practice review and highlight the action areas.
106. Chart the percentage of your time spent on the tasks of your job, and plan how to change them.
107. Develop a functional organizational chart.
108. Examine productivity standards and measurement systems.
109. Review order flow and duplication of effort.
110. Work on a periodic presentation to employees' format
111. Do resource planning
112. Develop an email policy
113. Outline an operations manual
114. Review service levels and discuss tracking methods
115. Develop vendor qualification criteria
116. Develop an outsourcing plan
117. Review all major suppliers and work on alternative sources
118. Review technology needs or updates.
119. Discuss data storage and disaster recovery methods
120. Setup website, email systems, or other office technology.

Family Business or Partnerships

- 121. Discuss potential successors
- 122. Review insurance
- 123. Develop a training plan for key executives
- 124. Develop a backup plan for key executives
- 125. Develop a family employment “contract”
- 126. Develop a compensation plan for family members
- 127. Discuss buy-sell agreements
- 128. Discuss what should be included in a plan outlining location of all important documents

I'm ready to use all my knowledge, experience, and coaching expertise to help in any reasonable way you can think of.

The private coaching meeting is your **resource**. Please take a few minutes to consider how to best use it for your personal and professional growth.