

# PREVUE FACILITATION GUIDELINES

**Being an effective coach is the primary duty of any Manager or Supervisor. The coaching process is all about building a "Communications Link" between management and employee.**

## ***Instructions:***

1. Provide a copy of the Employee portion of the Prevue report to the employee. The Coach copy includes a job suitability rating and coaching tips. This portion of the report is Confidential and should not be shared with the employee.
2. Provide the appropriate Success Discovery Process (SDP) workbook
3. Ask the employee underline or highlight any statement in their copy of the report they strongly disagree with. Ask they fill out the "Success Discovery Process" Workbook and complete an Action Plan for improvement" focusing on the three most important areas to be improved. These items must be completed before the facilitation discussion.
4. Create a discussion agenda by underlining any statement on the review that, in your opinion is true, but impacts negatively on the employees' performance. Use this information along with notes from the employees' personnel file and job description to fill out your version of the "Action Plan" to be used as your discussion agenda. Also highlight positive statements that are true, use these to deliver praise to the employee. Balance development comments with praise commentary.
5. Create an unhurried setting, allow at least one hour for the facilitation process; serve a beverage, keep it casual. Remember your goal is to establish a dialog and assist the employee in creating their own development program. Allow the employee to do more than half of the talking. Ask their opinion of the Review; ask them to discuss any statement in the report with which they strongly disagree. Ask open ended questions. Ask for suggestions. Listen! Ask if you can take notes.
6. Your goal is to obtain improved performance through interactive dialog. It cannot be achieved if the employee has set up defensive barriers. Use positive comments to maintain interest. As they discuss statements from the report in dispute, it is acceptable to add your comments. Remember to agree or disagree with the REPORT not the employee. Do not be general, give specific examples. Stick to facts.  
If the employee disagrees with a statement in the report and you concur say "In this instance I disagree with the report." If the employee disagrees with a statement in the report and it is true, say "In this instance I agree with the report and let me give you an example."
7. Don't allow complaints about the company, other employees, or other departments to mask the real purpose of this discussion; which is, to improve the performance of the employee being reviewed. Salary, benefits, and money issues are not and should never be part of the performance review and facilitation process. Compensation levels should increase only when the employee increases their value to the organization.
8. Combine your "Action Plan for Improvement" with theirs. Decide on mutually agreed improvement goals and write up a new "Action Plan" focusing on no more than 3 areas for improvement. Get input from the employee as to the best way to accomplish goals, and the time-frames involved.
9. Continue the momentum. Review the performance goals, weekly if necessary, to make certain focus is being maintained. When the first three areas for improvement are corrected; create a new action plan to address other issues. Focus and follow-up!

# UNDERSTANDING THIS REPORT

## ■ THE PURPOSE OF THIS REPORT:

The Prevue Corporate Coach report provides information that will assist a coach, manager, or facilitator in understanding the examinee's unique profile. It can also assist the examinee in better understanding themselves and their approach to the job and to the work environment. The report provides insight into the examinee's personality and a wide range of important work related characteristics. It is intended to assist in the coach-client relationship by providing the starting point for a meaningful discussion about the examinee's values, needs, and objectives. Further, the report should assist the Coach to ask pertinent questions and provide relative feedback and ideas that are custom tailored for the individual. Our goal is to assist you in helping the examinee to develop greater effectiveness on the job and increasing their overall job satisfaction.

## ■ WHERE DOES THE INFORMATION IN THIS REPORT COME FROM?

The information in this report is derived from the examinee's responses to the Prevue Corporate Coach Assessment. This assessment is comprised of the personality and interest inventories from the validated and reliable ICES Plus Assessment test, a psychometric test battery developed in the early 1990's by View Assessments International under the direction of Dr. David Bartram, one of the world's leading psychometricians. The ICES Plus Assessment is the cornerstone of a number of respected and established employment and vocational assessments. These products have been used to assess more than one million people in North America alone.

## ■ RECOMMENDATION:

We ask that you review this assessment carefully. In the Coaching session ask the examinee to discuss the report, especially areas in which they are in disagreement (if any). Listen more than talk. Ask open ended questions and encourage interactive dialog. **Make certain the examinee attends the interview with a completed action plan.**

## ■ DEVELOPMENT PROGRAM:

Attached to this report please find a blank "Action Plan" with space for listing three areas for improvement. Listed below is a link to the Corporate Coach workbook. Select three things that, after reading this report, and reviewing the examinee's job description, you feel should be addressed to improve their performance at work and increase their overall value to the organization. At the conclusion of the interview combine your action plan with that of the examinee. Discuss target dates and develop a commitment contract. Follow-up often to ensure that goals are achieved.

## ■ SUCCESS DISCOVERY PROCESS WORKBOOK

Go to [www.analyst-link.net](http://www.analyst-link.net) - click on SDP Workbook - **print workbook #21**

If this is a management position also print workbook #22

# ACTION PLAN for Self-Development

NAME: \_\_\_\_\_

List three areas in which you see the need to focus effort along with your plan of action to achieve the desired goal. Select improvement items from the Development Guide, the text report, or suggestions from your manager or facilitator.

- **FIRST FOCUS AREA:** \_\_\_\_\_

Action Plan - Steps I will use to achieve improvement goals in this area:

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*Time frame to achieve this goal:*

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- **SECOND FOCUS AREA:** \_\_\_\_\_

Action Plan - Steps I will use to achieve improvement goals in this area:

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*Time frame to achieve this goal:*

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- **THIRD FOCUS AREA:** \_\_\_\_\_

Action Plan - Steps I will use to achieve improvement goals in this area:

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*Time frame to achieve this goal:*

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Date: / /

Action Plan Commitment Agreement by: \_\_\_\_\_ (Examinee)

Supported by: \_\_\_\_\_ (Manager/Facilitator)