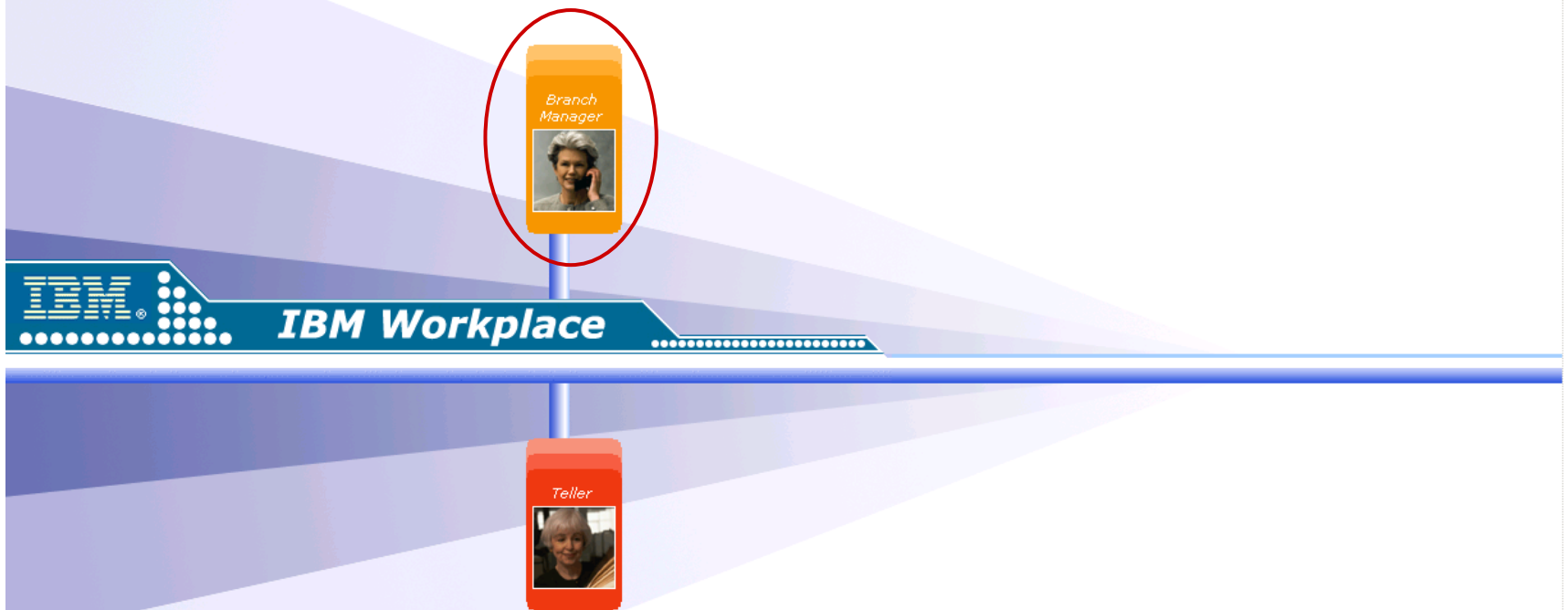


The demo consists of two roles: Teller and Branch Manager. For this component, we need to launch Branch Manager.

## IBM Workplace Branch Banking Demo



Martha the Branch Manager enters her office, turns on her computer, and is presented, as a default screen, her Home Page. This provides a view of her regional financial dashboard. She immediately sees an alert that the money market promotion is below target. Martha clicks on the scorecard button to see regional and branch indicators.

## OnDemand Workplace

Welcome **Martha Steiner**

Advanced Search

My Bank Home
Customer Central
Products & Services
Bank Information
News & Updates
Collaboration

[Profile Settings](#) | [Help](#) | [Sign Out](#)

Main
Scorecard
My People
My Projects
My Career

**Useful Links** Edit | ? - X

- Peoplefinder
- Expenses
- IT tools
- Time reporting

**Office Tools** Edit | ? - X

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

**Instant Messaging** Edit | ? - X

People
Meetings
Options
Help

■ **I am Active**

- Project Team
  - ◆ Mike Martin
  - Dennis Curry
  - Tal Herman
- Client Contacts
  - ◆ Valarie Myers
  - Colin Freeman

**XpertShare** Edit | ? - X

**Get Assistance**  
 Select area of assistance.

**Business Line:**

**Services:**

**Email** Edit | ? - X

**Are you making a life change?**

▶ Marriage

▶ Birth/Adoption

▶ Divorce

▶ Leave of Absence

▶ Relocation/Moving

▶ Retirement

**Lotus Workplace**

Folder:  Page 3 of 6 Jump to page:

From	Subject	Date	Size
<input type="checkbox"/> Jana Carter	<b>!</b> <a href="#">When you get in</a>	11/18/03	1K
<input type="checkbox"/> Dan Stoddard	<a href="#">putting together a training mem</a>	11/18/03	1K
<input type="checkbox"/> Mary Jones	<a href="#">Re: The new design</a>	11/18/03	3K
<input checked="" type="checkbox"/> Paula Edwards	<a href="#">Fw: The new design</a>	11/18/03	884K
<input type="checkbox"/> Chris Seller	<a href="#">Training opportunities</a>	11/18/03	2K
<input type="checkbox"/> Susan Provonost	Dec promos approval request	11/18/03	4K

Usage:  Page 3 of 6 Jump to page:

**Business Performance** Edit | ? - X

Key Financial Indicators

Measure	Actual	Change
Income	\$507,000	↑ 7.1%
Expenses	\$217,900	↑ 1.2%
Profit	\$289,100	↑ 16.9%

Key Sales Indicators

Measure	Actual	Change
Account openings	367	↓ 8.3%
Account closures	18	↓ 10%
New loan applications	216	↑ 6.9%

**Alerts** Edit | ? - X

▲ Insured Money Market Account promotion **BELOW TARGET**

▲ Pension reviews delayed

**Calendar** Edit | ? - X

Date:

Friday 11/21/2003

08:00 AM	<a href="#">Training - Sales and...</a>
09:00 AM	
10:00 AM	
11:00 AM	
12:00 PM	
1:00 PM	<a href="#">Follow up with Mary ...</a>

**News & Updates** Edit | ? - X

- OFN Newsletter
- 'Savings is Easy' college savings campaign starting in November! \*

**ACT NOW!**

- Establish your benefits PIN

As usual, she checks out branch indicators from last night, as they track against the weekly/monthly goals, etc. She sees among other things that New Deposits are “below target”. Martha drills down to see branch performance.

## OnDemand Workplace

Welcome **Martha Steiner**

Advanced Search

---

My Bank Home | Customer Central | Products & Services | Bank Information | News & Updates | Collaboration
Profile Settings | Help | Sign Out

---

Main | Scorecard | My People | My Projects | My Career

Useful Links

- Peoplefinder
- Expenses
- IT tools
- Time reporting

Office Tools

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

Instant Messaging

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
◆ Mike Martin			
Dennis Curry			
■ Tal Herman			
Client Contacts			
◆ Valarie Myers			
■ Colin Freeman			

XpertShare

Get Assistance

Select area of assistance.

**Business Line:**

**Services:**

Dashboard

**Branch:** Cherry Ridge  
1234 Main St.  
Springfield, NY 12345  
**Phone:** 212.555.1212

**Branch:** 57  
**District:** South  
**Region:** Northeast

**Branch manager:** ■ Martha Steiner  
**District manager:** Lou Reynolds  
**Regional manager:** ◆ Jane Langdon

**Alerts**  
  
  
**BELOW TARGET -**  
Deposit openings [Analyze it](#)

Overall view
\*Financial
\*Sales performance
\*Modeling

Customize

**O v e r a l l V i e w**

Profitability Ranking

[Branch ranking report](#)

Last month's score: 3

[Analyze it](#)

New Deposits

October

**BELOW TARGET**

[Analyze it](#)

Income and Expenses

[Analyze it](#)

New Loans

October

**ABOVE TARGET**

[Analyze it](#)

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3

She decides to review the Deposits by clicking on “Deposits” and then selecting “Drill Down” from the list.

## OnDemand Workplace

Welcome **Martha Steiner**

Go  
Advanced Search

---

My Bank Home
Customer Central
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News & Updates
Collaboration
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Help
Sign Out

---

### Useful Links

- Peoplefinder
- Expenses
- IT tools
- Time reporting


### Dashboard

**Branch:** Cherry Ridge  
1234 Main St.  
Springfield, NY 12345  
**Phone:** 212.555.1212

**Branch:** 57  
**District:** South  
**Region:** Northeast

**Branch manager:** ■ Martha Steiner  
**District manager:** Lou Reynolds  
**Regional manager:** ◆ Jane Langdon

**Alerts**



**BELOW TARGET** -  
Deposit openings [Analyze it](#)

Overall view
\*Financial
\*Sales performance
\*Modeling

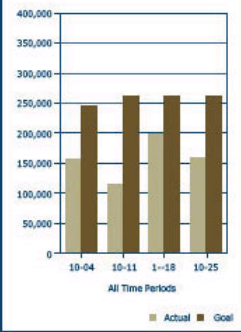
• By Product • By Individual • Reports • Ranking •


### By Product

Time: October
Measure: Open Balance
Undo
Redo

Product type	Goal Tracking	10-04	10-11	10-18	10-25
Deposit	al	\$156,275	\$112,500	\$198,400	\$162,000
Credit	al	\$244,375	\$262,500	\$262,500	\$262,500
All products	al	\$431,950	\$405,350	\$398,460	\$425,800
	al	\$408,000	\$410,000	\$415,000	\$420,000
	al	\$588,225	\$517,850	\$596,860	\$587,800
	al	\$652,375	\$672,500	\$677,500	\$682,500

#### Results by product





### Office Tools

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

### Instant Messaging

People Meetings Options Help

**I am Active**

- Project Team
  - ◆ Mike Martin
    - Dennis Curry
  - Tal Herman
- Client Contacts
  - ◆ Valarie Myers
  - Colin Freeman

### XpertShare

**Get Assistance**  
Select area of assistance.

**Business Line:**  
Personal

**Services:**  
Investments

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She can see that the Money market sales are not good. She highlights "Money Market".

## OnDemand Workplace

Welcome **Martha Steiner**

Go  
Advanced Search

My Bank Home
Customer Central
Products & Services
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Profile Settings
Help
Sign Out

Main
Scorecard
My People
My Projects
My Career

### Useful Links

- Peoplefinder
- Expenses
- IT tools
- Time reporting

### Dashboard

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1234 Main St.  
Springfield, NY 12345  
**Phone:** 212.555.1212

**Branch:** 57  
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Overall view
\*Financial
\*Sales performance
\*Modeling

• By Product
• By Individual
• Reports
• Ranking

### By Product

Time	Measure	Open Balance				
Product Type	Goal Tracking	10-04	10-11	10-18	10-25	
Checking	Actual	\$30,925	\$22,500	\$43,250	\$36,000	
	Goal	\$46,000	\$48,500	\$48,500	\$48,500	
Savings	Actual	\$44,450	\$34,000	\$53,600	\$43,550	
	Goal	\$59,800	\$63,700	\$63,700	\$63,700	
*Money Market	Actual	\$10,800	\$6,750	\$14,780	\$9,200	
	Goal	\$36,400	\$39,000	\$39,000	\$39,000	
CD	Actual	\$44,750	\$33,100	\$51,300	\$42,150	
	Goal	\$64,375	\$68,500	\$68,500	\$68,500	
IRA	Actual	\$25,350	\$18,450	\$35,470	\$31,100	
	Goal	\$37,800	\$42,800	\$42,800	\$42,800	
Deposit	Actual	\$156,275	\$112,500	\$198,400	\$162,000	
	Goal	\$244,375	\$262,500	\$262,500	\$262,500	
Credit	Actual	\$431,950	\$405,350	\$398,460	\$425,800	
	Goal	\$408,000	\$410,000	\$415,000	\$420,000	
All products	Actual	\$588,225	\$517,850	\$596,860	\$587,800	
	Goal	\$652,375	\$672,500	\$677,500	\$682,500	

#### Results by product

Alerts
▲

**BELOW TARGET** - Deposit openings [Analyze it](#)

### Instant Messaging

People
Meetings
Options
Help

**I am Active**

- Project Team
  - ◆ Mike Martin
  - Dennis Curry
  - Tal Herman
- Client Contacts
  - ◆ Valarie Myers
  - Colin Freeman

### XpertShare

**Get Assistance**  
Select area of assistance.

**Business Line:**  
Personal

**Services:**  
Investments

[Get Assistance Now](#)

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She now clicks on "By Individual" to see how well her employees are selling the product.

## OnDemand Workplace

Welcome **Martha Steiner**

Advanced Search

---

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News & Updates
Collaboration
Profile Settings
Help
Sign Out

---

Main
Scorecard
My People
My Projects
My Career

---

**Useful Links** Edit | ? - X

- Peoplefinder
- Expenses
- IT tools
- Time reporting

**Office Tools** Edit | ? - X

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

**Instant Messaging** Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
◆ Mike Martin			
Dennis Curry			
■ Tal Herman			
Client Contacts			
◆ Valarie Myers			
■ Colin Freeman			

**XpertShare** Edit | ? - X

**Get Assistance**  
 Select area of assistance.

**Business Line:**

**Services:**

**Dashboard** Edit | ? - X

**Branch:** Cherry Ridge  
1234 Main St.  
Springfield, NY 12345  
**Phone:** 212.555.1212

**Branch:** 57  
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**Branch manager:** ■ Martha Steiner  
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**Alerts**

**BELOW TARGET** -  
Deposit openings [Analyze it](#)

Overall view
\*Financial
\*Sales performance
\*Modeling

• By Product • • **By Individual** • Reports • Ranking

### By Product

Time 
Measure 
Undo Redo PDF PBL

Product Type	Goal Tracking	10-04	10-11	10-18	10-25
Checking	Actual	\$30,925	\$22,500	\$43,250	\$36,000
	Goal	\$46,000	\$48,500	\$48,500	\$48,500
Savings	Actual	\$44,450	\$34,000	\$53,600	\$43,550
	Goal	\$59,800	\$63,700	\$63,700	\$63,700
Money Market	Actual	\$10,800	\$6,750	\$14,780	\$9,200
	Goal	\$36,400	\$39,000	\$39,000	\$39,000
CD	Actual	\$44,750	\$33,100	\$51,300	\$42,150
	Goal	\$64,375	\$68,500	\$68,500	\$68,500
IRA	Actual	\$25,350	\$18,450	\$35,470	\$31,100
	Goal	\$37,800	\$42,800	\$42,800	\$42,800
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Credit	Actual	\$431,950	\$405,350	\$398,460	\$425,800
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All products	Actual	\$588,225	\$517,850	\$596,860	\$587,800
	Goal	\$652,375	\$672,500	\$677,500	\$682,500

**Results by product**

All Time Periods

She sees that Jana Carter is doing poorly with the new promotion. This is an issue for her because she knows, in reviewing the branch's performance in the past, that Jana has had trouble selling new product promotions. Martha selects My People from the navigator panel to further review Jana's background information.

## OnDemand Workplace

Welcome **Martha Steiner**

Advanced Search

---

My Bank Home
Customer Central
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News & Updates
Collaboration
Profile Settings
Help
Sign Out

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Main
Scorecard
My People
My Projects
My Career

---

**Useful Links** Edit | ? - X

- Peoplefinder
- Expenses
- IT tools
- Time reporting

**Office Tools** Edit | ? - X

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

**Instant Messaging** Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
◆ Mike Martin			
Dennis Curry			
■ Tal Herman			
Client Contacts			
◆ Valarie Myers			
■ Colin Freeman			

**XpertShare** Edit | ? - X

**Get Assistance**  
 Select area of assistance.
 

**Business Line:**

**Services:**

**Dashboard** Edit | ? - X

**Branch:** Cherry Ridge  
1234 Main St.  
Springfield, NY 12345  
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**Branch:** 57  
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**Region:** Northeast

**Branch manager:** ■ Martha Steiner  
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**Alerts**  
  
**BELOW TARGET** - Deposit openings [Analyze it](#)

Overall view
\*Financial
\*Sales performance
\*Modeling

• By Product
• **By Individual**
• Reports
• Ranking

B y I n d i v i d u a l

Time:  Product:  Undo Redo PDF PBL

Employee Name	Goal	Actual	% Quota	Forecast	Actual
Susanna Dogood	\$12,000	\$2,000	17%		
Michael Roush	\$13,100	\$6,800	52%		
John Napersons	\$13,100	\$2,540	19%		
Zach Pillsbury	\$12,000	\$3,800	32%		
Kevin Mills	\$13,100	\$2,100	16%		
Shakira Smiley	\$10,000	\$4,800	48%		
Michael Wesson	\$12,000	\$1,870	16%		
Laura Johnson	\$10,000	\$3,600	36%		
Jana Carter	\$10,000	\$1,350	14%		
Jim Knopf	\$12,000	\$6,000	50%		
Jenny Carter	\$11,000	\$1,950	18%		
Bill Wagstaff	\$13,100	\$2,500	19%		
Steve Wagner	\$12,000	\$2,200	18%		

\$0 \$2,000 \$4,000 \$6,000 \$8,000 \$10,000 \$12,000

**External Links**

**e-Learning**

[Motivating Low Performing Employees](#)

[Motivating High Performing Employees](#)

[Coaching: Sales Effectiveness](#)

**OFM Sales School**  
 OFM Sales School is permanent, systematic, and uniformly coherent global training program for all OFM sales professionals.

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Martha wants to see whether Jana was able to take the education that was advised as a result of the last discussion regarding her sales promotion performance. She selects Jana's profile.

OnDemand Workplace

   
Advanced Search

Welcome **Martha Steiner**

[My Bank Home](#) | [Customer Central](#) | [Products & Services](#) | [Bank Information](#) | [News & Updates](#) | [Collaboration](#)

[Profile Settings](#) | [Help](#) | [Sign Out](#)

[Main](#) | [Scorecard](#) | [My People](#) | [My Projects](#) | [My Career](#)

Useful Links

- [Peoplefinder](#)
- [Expenses](#)
- [IT tools](#)
- [Time reporting](#)

Office Tools

- [Excel](#)
- [Powerpoint](#)
- [Webcast](#)
- [Word](#)
- [Quickplace](#)

Instant Messaging

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
<ul style="list-style-type: none"> <li><span style="color: green;">◆</span> <b>Mike Martin</b></li> <li style="padding-left: 20px;">Dennis Curry</li> <li><span style="color: green;">■</span> <b>Tal Herman</b></li> </ul>			
Client Contacts			
<ul style="list-style-type: none"> <li><span style="color: green;">◆</span> <b>Valarie Myers</b></li> <li><span style="color: green;">■</span> <b>Colin Freeman</b></li> </ul>			

XpertShare

Get Assistance

Select area of assistance.

**Business Line:**

Personal

**Services:**

Investments

Dashboard

#	Action Items & Alerts	Date	Sender	Status
1	New Hire Checklist - Mark Andrews	11/16/2003	Automated	Pending
2	Transfer approval - Roy Davis	11/15/2003	John Hanes	Pending
3	Pension Reviews	11/15/2003	Automated	Pending
4	December promo approvals request	11/12/2003	Automated	Pending
5	Branch Manager quarterly meeting	11/12/2003	Sam Jackson	Scheduled
6	Employee assessments	11/12/2003	Automated	Scheduled
7	New coaching Quickview	11/10/2003	Automated	Pending

My Staff

• Jana Carter
• Susanna Dogood
• Kevin Mills
• John Napersons
• Zachary Pillsbury

M y S t a f f

Name	Position	View
<a href="#">Kevin Mills</a>	Customer Service Representative	
<a href="#">Susanna Dogood</a>	Customer Service Representative	
<a href="#">Jana Carter *</a>	Customer Service Representative	
<a href="#">John Napersons</a>	Financial Advisor	
<a href="#">Zachary Pillsbury</a>	Financial Advisor	
<a href="#">Michael Roush</a>	Financial Advisor	
<a href="#">Mivalilla Stanmeyer</a>	Customer Service Representative	
<a href="#">Shakira Smiley</a>	Financial Advisor	
<a href="#">Bach Lava Vig</a>	Customer Service Representative	

Programs & Offerings

- [Coaching Simulator](#)
- [Incentives](#)
- [Mentoring](#)

[more >](#)

Top Requested Topics

- [HR Contacts](#)
- [Teamroom+](#)
- [Quickview](#)



She drills down into Jana's Education folder ...

## OnDemand Workplace

Welcome **Martha Steiner**

Go  
Advanced Search

---

[My Bank Home](#) | [Customer Central](#) | [Products & Services](#) | [Bank Information](#) | [News & Updates](#) | [Collaboration](#)

[Profile Settings](#) | [Help](#) | [Sign Out](#)

---

**Useful Links** Edit | ? - X

- [Peoplefinder](#)
- [Expenses](#)
- [IT tools](#)
- [Time reporting](#)

**Office Tools** Edit | ? - X

- [Excel](#)
- [Powerpoint](#)
- [Webcast](#)
- [Word](#)
- [Quickplace](#)

**Instant Messaging** Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
<ul style="list-style-type: none"> <li><span style="color: green;">◆</span> <b>Mike Martin</b></li> <li style="padding-left: 40px;">Dennis Curry</li> <li><span style="color: green;">■</span> <b>Tal Herman</b></li> </ul>			
Client Contacts			
<ul style="list-style-type: none"> <li><span style="color: green;">◆</span> <b>Valarie Myers</b></li> <li><span style="color: green;">■</span> <b>Colin Freeman</b></li> </ul>			

**XpertShare** Edit | ? - X

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

**Dashboard** Edit | ? - X

#	Action Items & Alerts	Date	Sender	Status
1	New Hire Checklist - Mark Andrews	11/16/2003	Automated	Pending
2	Transfer approval - Roy Davis	11/15/2003	John Hanes	Pending
3	Pension Reviews	11/15/2003	Automated	Pending
4	December promo approvals request	11/12/2003	Automated	Pending
5	Branch Manager quarterly meeting	11/12/2003	Sam Jackson	Scheduled
6	Employee assessments	11/12/2003	Automated	Scheduled
7	New coaching Quickview	11/10/2003	Automated	Pending

My Staff	My Peers	All Staff	Management
<a href="#">Kevin Mills</a>	<a href="#">Susanna Dogood</a>	<a href="#">Jana Carter</a>	<a href="#">John Napersons</a>
		<a href="#">Zachary Pillsbury</a>	

Jana Carter									
<ul style="list-style-type: none"> <li><a href="#">Personal</a></li> <li><a href="#">Assessments</a></li> <li style="border: 2px solid red; border-radius: 50%; padding: 2px;"><a href="#">Education *</a></li> <li><a href="#">Position History</a></li> <li><a href="#">Miscellaneous</a></li> </ul>	<div style="text-align: center;"> </div> <p><b>Contact Information</b></p> <p><b>Jana Carter</b>            3457 Anywhere Street            Anytown, NJ 08807            Spouse: Brett Carter</p> <p><b>Basic Information</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;"><b>Location</b></td> <td>Brumsfield office, 2nd Fl #789, Anytown, NJ</td> </tr> <tr> <td><b>Position</b></td> <td>Position Title</td> </tr> <tr> <td><b>ID</b></td> <td>5556785</td> </tr> <tr> <td><b>Hired</b></td> <td>02/19/2000</td> </tr> </table>	<b>Location</b>	Brumsfield office, 2nd Fl #789, Anytown, NJ	<b>Position</b>	Position Title	<b>ID</b>	5556785	<b>Hired</b>	02/19/2000
<b>Location</b>	Brumsfield office, 2nd Fl #789, Anytown, NJ								
<b>Position</b>	Position Title								
<b>ID</b>	5556785								
<b>Hired</b>	02/19/2000								

**Alerts**

- ▲ SIG BELOW TARGET - Insured Money Market Account promotion
- ▲ Required training past due: IMMA promotion

**Of Interest**

- ★ Item of interest
- ★ Item of interest

**Programs & Offerings**

- [Coaching Simulator](#)
- [Incentives](#)
- [Mentoring](#)
- [more >](#)

**Top Requested Topics**

- [HR Contacts](#)
- [Teamroom+](#)
- [Quickview](#)

**Advisor** Edit | ? - X

### Motivation

The "What motivates you?" questionnaire is designed to encourage 2-way communication between employee and manager. [Click Here](#)

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... and clicks to view her classes.

## OnDemand Workplace

Welcome **Martha Steiner**

Advanced Search

My Bank Home | Customer Central | Products & Services | Bank Information | News & Updates | Collaboration
Profile Settings | Help | Sign Out

Main | Scorecard | My People | My Projects | My Career

Useful Links

- Peoplefinder
- Expenses
- IT tools
- Time reporting

Office Tools

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

Instant Messaging

People Meetings Options Help

**I am Active**

- Project Team
  - ◆ Mike Martin
  - Dennis Curry
- Tal Herman
- Client Contacts
  - ◆ Valarie Myers
  - Colin Freeman

XpertShare

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

Dashboard

Edit ? - X

#	Action Items & Alerts	Date	Sender	Status
1	New Hire Checklist - Mark Andrews	11/16/2003	Automated	Pending
2	Transfer approval - Roy Davis	11/15/2003	John Hanes	Pending
3	Pension Reviews	11/15/2003	Automated	Pending
4	December promo approvals request	11/12/2003	Automated	Pending
5	Branch Manager quarterly meeting	11/12/2003	Sam Jackson	Scheduled
6	Employee assessments	11/12/2003	Automated	Scheduled
7	New coaching Quickview	11/10/2003	Automated	Pending

My Staff	My Peers	All Staff	Management
----------	----------	-----------	------------

• Kevin Mills • Susanna Dogood • Jana Carter • John Napersons • Zachary Pillsbury

J a n a C a r t e r

- ▶ Personal
- ▶ Assessments
- ▼ Education
  - **Classes \***
  - Safety
  - Certification
- ▶ Position History
- ▶ Miscellaneous

**Formal Degree Education**

Year Graduated	School	Degree	Major
1994	University of Houston	Bachelor of Science	Business Administration

**Languages**

Languages Spoken	Native Language	Translator	Read	Write	Speak
English	Yes	Yes	Yes	Yes	Yes
Japanese	No	Yes	Yes	Yes	Yes

**Alerts**

- ▲ SIG BELOW TARGET - Insured Money Market Account promotion
- ▲ Required training past due: IMMA promotion

**Of Interest**

**OFM Sales School**

OFM Sales School is a permanent, systematic, and uniformly consistent global training program for all OFM sales professionals.

Advisor

Edit ? - X

**Motivation**

The "What motivates you?" questionnaire is designed to encourage 2-way communication between employee and manager. [Click Here](#)

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She sees that Jana has taken many of the classes, but notes that she has once again put off the latest product promotion class. She decides to review Jana's previous performance appraisal to refresh her memory about what was discussed previously about this issue.

## OnDemand Workplace

Welcome **Martha Steiner**

Go  
Advanced Search

---

My Bank Home
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Collaboration
Profile Settings
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Sign Out

---

### Useful Links

- Peoplefinder
- Expenses
- IT tools
- Time reporting

### Dashboard

#	Action Items & Alerts	Date	Sender	Status
1	New Hire Checklist - Mark Andrews	11/16/2003	Automated	Pending
2	Transfer approval - Roy Davis	11/15/2003	John Hanes	Pending
3	Pension Reviews	11/15/2003	Automated	Pending
4	December promo approvals request	11/12/2003	Automated	Pending
5	Branch Manager quarterly meeting	11/12/2003	Sam Jackson	Scheduled
6	Employee assessments	11/12/2003	Automated	Scheduled
7	New coaching Quickview	11/10/2003	Automated	Pending

#### Programs & Offerings

- [Coaching Simulator](#)
- [Incentives](#)
- [Mentoring](#)
- [more >](#)

#### Top Requested Topics

- [HR Contacts](#)
- [Teamroom+ Quickview](#)

### Office Tools

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

### Instant Messaging

People Meetings Options Help

**I am Active**

- Project Team
  - Mike Martin
    - Dennis Curry
  - Tal Herman
- Client Contacts
  - Valarie Myers
  - Colin Freeman

### XpertShare

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

### Education for Jana Carter

Date	Name	Code	Req/Opt	Complete	Results
10/24/03	IMMA Promotion	DN968	Required	NO	Past due
05/13/03	Techniques for Customer Interactions	DN105	Required	YES	Excellent
12/01/02	Service Excellence	PD6709	Optional	YES	Good
01/05/02	Cross-Selling Deposit Products	DN865	Required	YES	Excellent
06/29/01	Open Financial Workplace Basics	C555121	Optional	YES	Good
04/14/01	Account Specialist Certification	IWB54	Required	YES	Excellent
11/01/00	Presenting the Product	PD6710	Optional	YES	Excellent
10/24/00	Communication Skills	SIMF20B	Optional	YES	Excellent
09/25/00	New Account Fraud Prevention	DN444	Required	YES	Excellent
09/25/00	Open Financial Workplace Basics	C4451212	Optional	YES	Good
09/14/00	Mutual Fund Fundamentals	IWB55	Required	YES	Excellent

In reviewing the file, she notes that Jana scores fairly well across most of metrics her people are measured on, but...

## OnDemand Workplace

Welcome **Martha Steiner**

Advanced Search

---

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---

**Useful Links** Edit | ? - X

- [Peoplefinder](#)
- [Expenses](#)
- [IT tools](#)
- [Time reporting](#)

**Office Tools** Edit | ? - X

- [Excel](#)
- [Powerpoint](#)
- [Webcast](#)
- [Word](#)
- [Quickplace](#)

**Instant Messaging** Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
◆ <b>Mike Martin</b>			
Dennis Curry			
■ <b>Tal Herman</b>			
Client Contacts			
◆ <b>Valarie Myers</b>			
■ <b>Colin Freeman</b>			

**XpertShare** Edit | ? - X

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

**Dashboard** Edit | ? - X

#	Action Items & Alerts	Date	Sender	Status
1	New Hire Checklist - Mark Andrews	11/16/2003	Automated	Pending
2	Transfer approval - Roy Davis	11/15/2003	John Hanes	Pending
3	Pension Reviews	11/15/2003	Automated	Pending
4	December promo approvals request	11/12/2003	Automated	Pending
5	Branch Manager quarterly meeting	11/12/2003	Sam Jackson	Scheduled
6	Employee assessments	11/12/2003	Automated	Scheduled
7	New coaching Quickview	11/10/2003	Automated	Pending

My Staff	My Peers	All Staff	Management
● Kevin Mills	● Susanna Dogood	● <b>Jana Carter</b>	● John Napersons
		● Zachary Pillsbury	

J a n a C a r t e r

▶ Personal

▼ Assessments

- 2003
- 2002
- 2001
- Assessment Updates

▶ Education

▶ Position History

▶ Miscellaneous

Assessment Information 2003

**The sections on this form are:**

1. Employee Information and Assessment Dates
2. Objectives & Results: Win, Execute, Team
3. Overall Rating and Assessment \*
4. Signature List

**1. Employee Information and Assessment Dates**

Basic Information	
Location	Brumsfield office, 2nd Fl #789, Anytown, NJ
Position	Position Title
ID	5556785
Hired	02/19/2000

**Assessment Dates**

Assessment period	<b>2002/01/01 to 2002/12/31</b>
Interim review dates	
Employee/Manager final review date	<b>2003/01/22</b>

**Alerts**

⚠ SIG BELOW TARGET - Insured Money Market Account promotion

⚠ Req training past due: IMMA promo

**Of Interest**

⚠ Motivating Low Performing Employees

... it also reminded her that she was quite difficult during the last performance review when she disagreed with the feedback she was given. At this point, Martha decides to set up a meeting with Jana to discuss her new product promotion performance. Martha wants to prepare for Jana's expected demeanor during the counseling session. She clicks on "My Career".

OnDemand Workplace
Go

Welcome **Martha Steiner**
Advanced Search

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Main Scorecard My People My Projects My Career

Useful Links Edit | ? - X

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- [Expenses](#)
- [IT tools](#)
- [Time reporting](#)

Office Tools Edit | ? - X

- [Excel](#)
- [Powerpoint](#)
- [Webcast](#)
- [Word](#)
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Instant Messaging Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
	<b>Mike Martin</b>		
	Dennis Curry		
	<b>Tal Herman</b>		
Client Contacts			
	<b>Valarie Myers</b>		
	<b>Colin Freeman</b>		

XpertShare Edit | ? - X

Get Assistance

Select area of assistance.

**Business Line:**

**Services:**

Dashboard Edit | ? - X

#	Action Items & Alerts	Date	Sender	Status
1	New Hire Checklist - Mark Andrews	11/16/2003	Automated	Pending
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My Staff My Peers All Staff Management

- Kevin Mills
- Susanna Dogood
- **Jana Carter**
- John Napersons
- Zachary Pillsbury

▶

Jana Carter

- ▶ Personal
- ▼ Assessments
  - 2003
  - 2002
  - 2001
  - Assessment Updates
- ▶ Education
- ▶ Position History
- ▶ Miscellaneous

Assessment Information 2003

3. Overall Rating and Assessment

Job Performance

Jana scores in the top half on production and quality.

Promotions

Jana often performed poorly with new promotions relative to her peers. Required training is overlooked on occasion, which may be a cause.

Communication

**Communication with customers** Expresses facts and ideas clearly, in a credible manner. Uses an appropriate tone. Displays excellent judgement as to what information should be communicated.

**Communication with peers** Jana often shows talent for inspiring and motivating her peers.

**Communication with management** Does not readily accept creative criticism and/or feedback from those in management positions. Jana is a good listener, but quickly becomes defensive when given suggestions on how to better perform her daily tasks.

◀ Prev 7 of 8 Next ▶

Programs & Offerings

- [Coaching Simulator](#)
- [Incentives](#)
- [Mentoring](#)

more >

Top Requested Topics

- [HR Contacts](#)
- [Teamroom+](#)
- [Quickview](#)

Advisor Edit | ? - X

Motivation

The "What motivates you?" questionnaire is designed to encourage...

She goes to her personal Career area of the portal and clicks into Training & e-Learning to identify an e-learning nugget refresher course on counseling employees.

## OnDemand Workplace

Welcome Martha Steiner

Advanced Search

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My Bank Home | Customer Central | Products & Services | Bank Information | News & Updates | Collaboration
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Main | Scorecard | My People | My Projects | My Career

---

Useful Links

Edit | ? - X

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- [Expenses](#)
- [IT tools](#)
- [Time reporting](#)

Office Tools

Edit | ? - X

- [Excel](#)
- [Powerpoint](#)
- [Webcast](#)
- [Word](#)
- [Quickplace](#)

Instant Messaging

Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
◆ Mike Martin			
Dennis Curry			
■ Tal Herman			
Client Contacts			
◆ Valarie Myers			
■ Colin Freeman			

XpertShare

Edit | ? - X

Get Assistance

Select area of assistance.

**Business Line:**

**Services:**

Dashboard

Edit | ? - X

**Contact Information**

**Martha W. Steiner**  
 3457 Anywhere Street  
 Anytown, NJ 08807  
 Spouse: Roy M. Steiner

☎ 555-554-0987  
 ☎ 555-543-5678  
 ✉ steiner@of.com

**Basic Information**

**Location** Brumsfield office, #89, Anytown, NJ  
**Position** Position Title  
**ID** 5556779  
**Hired** 02/19/2000

My Profile
My Skills
My Health
My Money
Employee Programs
Workplace Policies

M y S k i l l s

▶ Training & e-Learning \* Skills Inventory for Martha Steiner

Name	Effective From	How Acquired	Last Assessed	How Assessed
▶ Career Planning				
▶ License & Certification				
▶ Resume & Skills				
Effective Delegation	02/19/2000	Experience	12/01/2002	Manager
Leveraging Target Markets	11/28/2002	Web-based training	11/28/2002	Performance test
Leading Your People to Success	02/19/2000	Experience	12/01/2002	Manager
Managing Large Accounts	02/19/2000	Experience	12/01/2002	Manager
Open Financial Workplace Basics	07/05/2001	Web-based training	12/01/2002	Annual review
Profitable Accounts	10/11/2002	Web-based training	10/11/2002	Performance test

Advisor

Edit | ? - X

Think you know it all?

Think again...

[\[read\]](#)

need career related forms?

[Check Here](#)

She searches for an appropriate module and receives a results list. A learning module, Dealing with Difficult People, catches her eye so she clicks on the title to review the information.

## OnDemand Workplace

Welcome **Martha Steiner**

Advanced Search

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My Projects
My Career

---

### Useful Links

- [Peoplefinder](#)
- [Expenses](#)
- [IT tools](#)
- [Time reporting](#)

### Dashboard



**Contact Information**  
**Martha W. Steiner**  
 3457 Anywhere Street  
 Anytown, NJ 08807  
 Spouse:  
 Roy M. Steiner

**Basic Information**

**Location** Brumsfield office, #89, Anytown, NJ

**Position** Position Title

**ID** 5556779

**Hired** 02/19/2000

**555-554-0987**

**555-543-5678**

**steiner@of.com**

My Profile
My Skills
My Health
My Money
Employee Programs
Workplace Policies

M y S k i l l s

**Search Courses**

Title Keyword(s)    Course Code  

View or Schedule	Title	Code	Overview Time
	<a href="#">Constructive Conflict Resolution</a>	WK188	10.0 minutes
	<a href="#">Corrective Action</a>	WK567	15.0 minutes
	<a href="#">Coaching Difficult People *</a>	TV1028FB	10.0 minutes
	<a href="#">Effective Delegation</a>	LTU2221F	5.0 minutes
	<a href="#">Hiring the Best Employees</a>	WK558	15.0 minutes
	<a href="#">Leading Your People to Success</a>	WK343	10.0 minutes
	<a href="#">Managing Matrix - The Leadership Press</a>	TV1028FB	15.0 minutes
	<a href="#">Managing Performance and Productivity</a>	WK233	15.0 minutes
	<a href="#">Techniques for Motivating Staff</a>	WK157	5.0 minutes
	<a href="#">21st Century Manager</a>	WK294	10.0 minutes

### Instant Messaging

People   Meetings   Options   Help

**I am Active**

- Project Team
  - Mike Martin
    - Dennis Curry
  - Tal Herman
- Client Contacts
  - Valarie Myers
  - Colin Freeman

### XpertShare

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

### Advisor



**Check this out**

**Do You Manage a New OFNer?**  
 Someone new is joining your team.  
 Not just a new member but a **new OFNer**.  
 "Your OFN" Manage Path QuickView. [Learn More](#)

**Learning Made Simple**  
 Learning on your own time and at your own pace.  
[OFN's Global Campus](#)



Martha reviews the e-learning material in the Overview.....

## OnDemand Workplace

Welcome **Martha Steiner**

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- Word
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Project Team			
◆ <b>Mike Martin</b>			
Dennis Curry			
■ <b>Tal Herman</b>			
Client Contacts			
◆ <b>Valarie Myers</b>			
■ <b>Colin Freeman</b>			

### XpertShare

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

### Dashboard

**Contact Information**  
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**Position:** Position Title

**ID:** 5556779

**Hired:** 02/19/2000

555-554-0987

555-543-5678

steiner@of.com

### My Skills

My Profile
My Skills
My Health
My Money
Employee Programs
Workplace Policies

#### M y S k i l l s

- ▶ Training & e-Learning
  - e-Learning
  - External Education
  - Global Campus
  - Learning Roadmap
- ▶ Career Planning
- ▶ License & Certification
- ▶ Resume & Skills

**Lotus LearningSpace**  
Release 5

- Main
- Materials
- Planner
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- Users
- Enrollment
- Results
- Reporter

e-Learning Class: Dealing with Difficult People

Overview
Articles
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FAQs
Resources
Tips/Traps

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1 of 1

### Coaching: Overview

What's your mental picture of someone coaching another person? Is the coach **telling** or **showing** the coachee what to think and how to act? This quick method usually gets things done, and that's the impression many have of what makes a good coach. But there is a better way. Picture that same coach, not telling or showing, but **asking** questions.

- "What have you done so far?"
- "What else could you do?"
- "What do you think is the right thing to do?"

Through effective questioning, the coach helps the coachee (1) raise the level of **awareness** about relevant factors of an issue and (2) accept **responsibility** to take the actions required. This coach is a **facilitator**, not an authority. This QuickView is based on John Whitmore's book *Coaching for Performance*.



# OnDemand Workplace

Welcome **Martha Steiner**

    
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## Useful Links Edit | ? - X

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## Office Tools Edit | ? - X

- Excel
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- Webcast
- Word
- Quickplace

## Instant Messaging Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
<ul style="list-style-type: none"> <li>◆ Mike Martin                             <ul style="list-style-type: none"> <li>■ Dennis Curry</li> <li>■ Tal Herman</li> </ul> </li> </ul>			
Client Contacts			
<ul style="list-style-type: none"> <li>◆ Valarie Myers</li> <li>■ Colin Freeman</li> </ul>			

## XpertShare Edit | ? - X

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

## Dashboard Edit | ? - X



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**Hired** 02/19/2000

- My Profile
- My Skills
- My Health
- My Money
- Employee Programs
- Workplace Policies

### My Skills

- ▶ Training & e-Learning
  - e-Learning
  - External Education
  - Global Campus
  - Learning Roadmap
- ▶ Career Planning
- ▶ License & Certification
- ▶ Resume & Skills

e-Learning Class: Dealing with Difficult People

Lotus LearningSpace Release 5

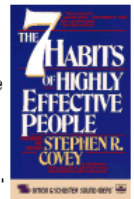
Overview **Articles** Basics FAQs Resources Tips/Traps

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### Coaching: Articles

**The 7 Habits of Highly Effective People: Powerful Lessons in Personal Change** Stephen Covey, Simon & Shuster, New York, 1989, ISBN-671-70863-5 \$11.20 for the paperback edition. There are also audio cassettes: \$24.47 for the 1-tape version, and \$41.97 for the 6-tape version. Although the word "coaching" is not used much in the book, the 7 habits are fundamental to effective coaching: 1. Be proactive, 2. Begin with the end in mind, 3. Put first things first, 4. Think win/win, or no deal 5. Seek first to understand, then to be understood 6. Synergise, 7. Sharpen the saw. Universal habits that are assets for any coach.



**QuickViews**

For managers in a rush!

## OnDemand Workplace

Welcome **Martha Steiner**

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**Useful Links** Edit | ? - X

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- Time reporting

**Office Tools** Edit | ? - X

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- Webcast
- Word
- Quickplace

**Instant Messaging** Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
<ul style="list-style-type: none"> <li>◆ Mike Martin                             <ul style="list-style-type: none"> <li>■ Dennis Curry</li> <li>■ Tal Herman</li> </ul> </li> </ul>			
Client Contacts			
<ul style="list-style-type: none"> <li>◆ Valarie Myers</li> <li>■ Colin Freeman</li> </ul>			

**XpertShare** Edit | ? - X

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

**Dashboard** Edit | ? - X

**Dashboard** ? - X

**Contact Information**

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**ID** 5556779

**Hired** 02/19/2000

**My Profile** | **My Skills** | **My Health** | **My Money** | **Employee Programs** | **Workplace Policies**

M y S k i l l s

▼ Training & e-Learning

- **e-Learning**
  - External Education
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- ▶ Career Planning
- ▶ License & Certification
- ▶ Resume & Skills

**e-Learning Class: Dealing with Difficult People**

Lotus LearningSpace  
Release 5

Coaching: Basics

---

**What is Coaching?**

In a word, it's "helping" -- helping people take responsibility for their work and career. According to John Whitmore, author of *Coaching for Performance*, "Coaching is unlocking people's potential to maximize their own performance. It is helping them to learn and grow, rather than teaching them."

**QuickViews**

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- Users
- Enrollment
- Results
- Reporter

For managers in a rush!

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## OnDemand Workplace

Welcome **Martha Steiner**

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My Career

Useful Links

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- [Expenses](#)
- [IT tools](#)
- [Time reporting](#)

Office Tools

- [Excel](#)
- [Powerpoint](#)
- [Webcast](#)
- [Word](#)
- [Quickplace](#)

Instant Messaging

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
<ul style="list-style-type: none"> <li>◆ <b>Mike Martin</b></li> <li style="padding-left: 20px;">Dennis Curry</li> <li>■ <b>Tal Herman</b></li> </ul>			
Client Contacts			
<ul style="list-style-type: none"> <li>◆ <b>Valarie Myers</b></li> <li>■ <b>Colin Freeman</b></li> </ul>			

XpertShare

**Get Assistance**

Select area of assistance.

**Business Line:**

Personal

**Services:**

Investments

Dashboard

<p><b>Contact Information</b></p> <p><b>Martha W. Steiner</b>                      3457 Anywhere Street                      Anytown, NJ 08807                      Spouse:                      Roy M. Steiner</p>	<p><b>Basic Information</b></p> <p><b>Location</b> Brumsfield office, #89, Anytown, NJ</p> <p><b>Position</b> Position Title</p> <p><b>ID</b> 5556779</p> <p><b>Hired</b> 02/19/2000</p>	
---	--	--

My Profile

My Skills

My Health

My Money

Employee Programs

Workplace Policies

M y S k i l l s

Training & e-Learning

- **e-Learning**
- External Education
- Global Campus
- Learning Roadmap

▶ Career Planning

▶ License & Certification

▶ Resume & Skills

e-Learning Class: Dealing with Difficult People

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**What is raising awareness?**

"Raising awareness" is helping the coachee gather information and determine what facts are relevant. This is done at the start of the coaching process and in a way that creates an environment where the coachee can establish the Goals (the "G" of G.R.O.W.) and understand the Reality (the "R" of G.R.O.W.) of the current situation.

What is likely to happen if you ask questions such as "Are you following the process?" or "Why didn't you do it the way I showed you?" You will probably generate less information and more defensiveness.

However, if you ask "Describe the process you followed" or "What actions did you take?" you usually get a different response. When raising awareness you want to ask questions that make the coachee focus on answers describing the situation, not judge the results.

**QuickViews**

For managers in a rush!

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At the last Basics page, she receives a message stating she has completed the module. She is invited to review the information within the FAQs, Resources and Tips/Traps pages as well. She decides to take a look, as the module has been very helpful.

OnDemand Workplace

   
 Advanced Search
 

Welcome Martha Steiner

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Useful Links Edit | ? - X

- Peoplefinder
- Expenses
- IT tools
- Time reporting

Office Tools Edit | ? - X

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

Instant Messaging Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
<ul style="list-style-type: none"> <li>◆ Mike Martin</li> <li>    Dennis Curry</li> <li>■ Tal Herman</li> </ul>			
Client Contacts			
<ul style="list-style-type: none"> <li>◆ Valarie Myers</li> <li>■ Colin Freeman</li> </ul>			

XpertShare Edit | ? - X

Get Assistance Select area of assistance.

**Business Line:**

**Services:**

Dashboard Edit | ? - X

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**Hired** 02/19/2000

My Profile
My Skills
My Health
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M y S k i l l s

Training & e-Learning

- **e-Learning**
- External Education
- Global Campus
- Learning Roadmap

▶ Career Planning

▶ License & Certification

▶ Resume & Skills

e-Learning Class: Dealing with Difficult People

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**QuickViews**

*For managers in a rush!*

### Will

This phase in the process converts a discussion into a decision. After all options have been considered, the coachee needs to decide what actions to take. The coach should aid this process but not impose his/her own will. It is the coachee's commitment to the **coachee's** own action plan that will generate the most chance of success.

In summary, this model is not a new trend. It is designed to create a climate where a coach helps people take responsibility for their work and career.

---

Congratulations!

You have completed the module "Coaching Difficult People"

This module will appear as "Completed" in your profile. Don't forget to take a look at other valuable information related to this module under [FAQs](#), [Resources](#) and [Tips/Traps](#).

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## OnDemand Workplace

Welcome **Martha Steiner**

Advanced Search

---

My Bank Home
Customer Central
Products & Services
Bank Information
News & Updates
Collaboration
Profile Settings
Help
Sign Out

---

Main
Scorecard
My People
My Projects
My Career

---

**Useful Links** Edit | ? - X

- Peoplefinder
- Expenses
- IT tools
- Time reporting

**Office Tools** Edit | ? - X

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

**Instant Messaging** Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
◆ <b>Mike Martin</b>			
Dennis Curry			
■ <b>Tal Herman</b>			
Client Contacts			
◆ <b>Valarie Myers</b>			
■ <b>Colin Freeman</b>			

**XpertShare** Edit | ? - X

**Get Assistance**  
Select area of assistance.

**Business Line:**  
Personal

**Services:**  
Investments

**Dashboard** Edit | ? - X

**Contact Information**  
**Martha W. Steiner**  
 3457 Anywhere Street  
 Anytown, NJ 08807  
 Spouse:  
 Roy M. Steiner

**Basic Information**

**Location:** Brumsfield office, #89, Anytown, NJ

**Position:** Position Title

**ID:** 5556779

**Hired:** 02/19/2000

M y S k i l l s

- ▶ Training & e-Learning
  - **e-Learning**
  - External Education
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e-Learning Class: Dealing with Difficult People

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Coaching: FAQs

**Why coach?**

Through coaching, you can help others to:

- maximize individual strengths
- overcome personal obstacles
- reach their full potential through continuous learning
- achieve new skills and competencies to become more effective
- prepare themselves for new responsibilities
- self-manage themselves

Other benefits of coaching are:

- increased employee satisfaction
- greater trust between a manager and direct reports
- more productive work groups
- expanded organizational capability

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# OnDemand Workplace

Welcome **Martha Steiner**

    
 Advanced Search

- My Bank Home
- Customer Central
- Products & Services
- Bank Information
- News & Updates
- Collaboration
- Profile Settings
- Help
- Sign Out

## Useful Links Edit | ? - X

- Peoplefinder
- Expenses
- IT tools
- Time reporting

## Office Tools Edit | ? - X

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

## Instant Messaging Edit | ? - X

People	Meetings	Options	Help
<b>I am Active</b>			
Project Team			
<ul style="list-style-type: none"> <li>◆ <b>Mike Martin</b></li> <li style="padding-left: 40px;">Dennis Curry</li> <li>■ <b>Tal Herman</b></li> </ul>			
Client Contacts			
<ul style="list-style-type: none"> <li>◆ <b>Valarie Myers</b></li> <li>■ <b>Colin Freeman</b></li> </ul>			

## XpertShare Edit | ? - X

**Get Assistance**  
Select area of assistance.

**Business Line:**

**Services:**

## Dashboard Edit | ? - X



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 Anytown, NJ 08807  
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Coaching: Resources

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BOOKS / AUDIO CASSETTES

For managers in a rush!

**Coaching for Performance: A Practical Guide to Growing Your Own Skills** by John Whitmore; Paperback, 2nd ed., 168pp., ISBN: 1857881702; Brealey, Nicholas Publishing Ltd, October 1996. Derived from Tim Galloway's "inner game of tennis" principles, this puts forward a strong case for why coaching is more than a technique -- it's a whole new style of management. Covers the benefits of coaching, includes a script of a real coaching session with someone who wants improved physical fitness, and explains each step of the 4-step "GROW" coaching model: 1. Goal -- what the person wants, 2. Reality -- what is happening now, 3. Options -- what could be done, 4. Will -- what the person commits to do.

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..... and Tips/Traps. She finds the information helpful and brief. Click "Sign Out"

A few days later.... Martha just finished her counseling session with Jana. It went much better than Martha expected. She attributes the successful meeting to the refresher hints she picked up in the e-Learning module.

**OnDemand Workplace**  
Welcome Martha Steiner

Advanced Search

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### Useful Links

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- Expenses
- IT tools
- Time reporting

### Office Tools

- Excel
- Powerpoint
- Webcast
- Word
- Quickplace

### Instant Messaging

People | Meetings | Options | Help

**I am Active**

- Project Team
  - Mike Martin
    - Dennis Curry
  - Tal Herman
- Client Contacts
  - Valarie Myers
  - Colin Freeman

### XpertShare

**Get Assistance**  
Select area of assistance.

**Business Line:**  
Personal

**Services:**  
Investments

Get Assistance Now

### Dashboard

**Contact Information**

**Martha W. Steiner**  
3457 Anywhere Street  
Anytown, NJ 08807  
Spouse: Roy M. Steiner

555-554-0987  
555-543-5678  
steiner@of.com

**Basic Information**

**Location:** Brumsfield office, #89, Anytown, NJ  
**Position:** Position Title  
**ID:** 5556779  
**Hired:** 02/19/2000

My Profile | My Skills | My Health | My Money | Employee Programs | Workplace Policies

### My Skills

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### Coaching: Tips/Traps

**TIPS**

The following tips relate to achieving "coaching moments":

**How to select the best time/place to coach:**

You must "pick your spots," that is, choose a good time and location. The best time and place will depend upon the person and the situation. Tips:

- Piggy-back on another conversation or meeting, which might lead "naturally" to the topic.
- Use regular performance-feedback sessions or skill/career discussions, or use simply informal "how's it going?" coffee sessions
- Set up a "prior agreement" that if either of you hear something about the other that warrants knowing about, it's okay to tell each other.

For managers in a rush!