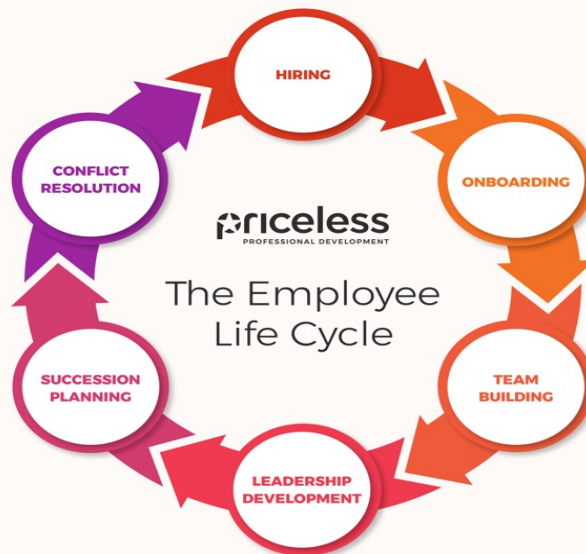


## WHAT'S COVERED:

1. Why Onboarding Matters
2. How to Use TriMetrix in Onboarding
3. What Development Tools are Available & How to Use Them

3

## Use TriMetrix Throughout the Employee Life Cycle



4

# TriMetrix BASICS

Listen, Watch, or Read:

## Episode 81: Hiring with TriMetrix

[pricelessprofessional.com/hiringwithtrimetrix](http://pricelessprofessional.com/hiringwithtrimetrix)

**SUZIE PRICE** | Priceless Professional Development | 770-842-2669  
suzie@pricelessprofessional.com | Certifications: CPF, CPDA, CPMA, TMEA, CAP

Helping you create a  
**Wake Up Eager** life.  
[www.pricelessprofessional.com](http://www.pricelessprofessional.com)

5

After You've Hired the Best, Use the TriMetrix Coaching Report

**50%\*** of Employees Voluntarily  
Leave After Two Years.  
**Reduce the Risk of Losing Them!**

6



GALLUP®

### Great Onboarding...

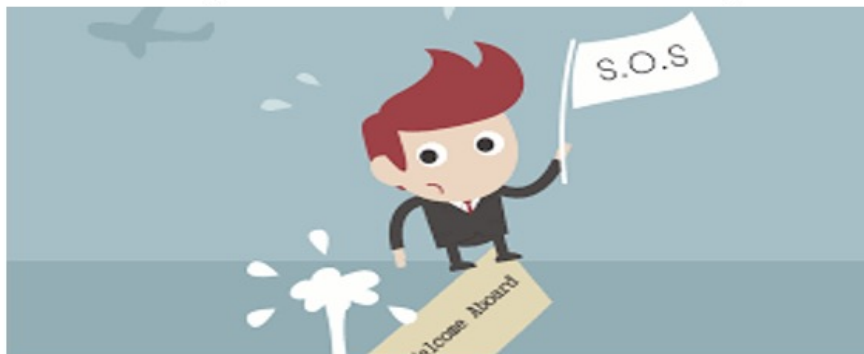
- Increase productivity by 82%
- Increase retention by 70%
- BUT only 12% of employees agree that org. do a good job

**HUGE Missed Opportunity!!**

7

#### One Employee's Experience:

*"The orientation day started at 8 a.m. and went to 6 p.m. There were no breaks throughout the day as they had lunch brought in. I felt like I was held captive. Then, we had homework to do in the evening"*



- 58% Onboarding is primarily process and paperwork
- On average there are 41 admin tasks assigned

8

I'm quitting to pursue my dream of not working here.

Another typical negative employee experience:  
***"Due to a lot of red tape and bureaucracy, I didn't have access to all the systems I needed to perform my job for 6 weeks!"***



9

**67%**  
**Soft Costs**

Such as reduced productivity, interview time and lost knowledge.



**33%**  
**Hard Costs**

Such as recruiting, background checks, drug screens and temp workers.

10

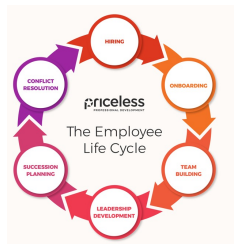


*“The very first day was great. But on the second, everyone (including my manager) was too busy to meet with me.”*

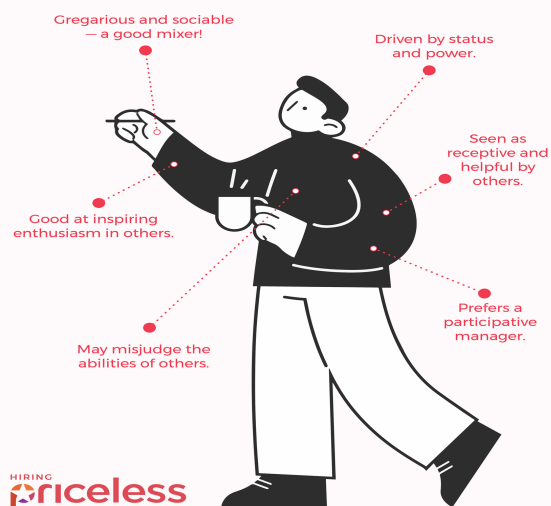


**How do you reduce the risk of losing this new hire?**

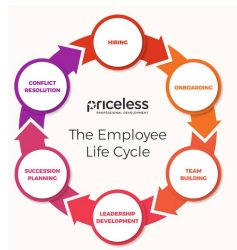
11



### Meet “New Hire Harry”



12



## COMMUNICATING WITH “New Hire Harry”

### THE DOs

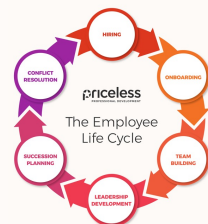
- ✓ Provide ideas for action.
- ✓ Define problems in writing.
- ✓ Clarify parameters in writing.
- ✓ Use a motivating approach.
- ✓ Understand his defiant nature.
- ✓ Provide solutions, not opinions.
- ✓ Flatter his ego.

### THE DO NOTs

- ✗ Leave decisions up in the air.
- ✗ “Dream” with him.
- ✗ Talk down to him.
- ✗ Drive on to facts and figures.
- ✗ Be dictatorial.
- ✗ Give him unsolicited opinions.
- ✗ Be curt, cold or tight-lipped.



13



## UNPACKING BLINDSPOTS WITH “New Hire Harry”



14



15

## Onboarding with TriMetrix -Four Step Process

1

New Hire TriMetrix Coaching Report

2

Send New Hire Email and Report

3

Meet with New Hire, Follow Agenda

4

Share Resources and Check-In

16



# TriMetrix Onboarding and Coaching Reference Document

## Wake Up Eager Employee/Leader

Onboarding and Coaching with TriMetrix - Step-by-Step Process and Resources

This step-by-step Onboarding and Coaching process and the related resources document will make it easy for any manager to quickly understand how to best motivate, manage and communicate with each employee.

Page | 1

According to employee engagement research, managers who take time to demonstrate that they care, focus on strengths, and provide growth and development opportunities for their employees have less turnover and higher commitment.

### Reference Notes:

- The person with an assessment is the **coachee**, and will be referred to as **PWA**.
- We recommend using our **streamlined Coaching Report** (sample report) so that no assessment training is needed to discuss results and determine the next steps.
- Consider using this process for your growth. The best **TriMetrix** Coaches are those who understand their results.
- These processes can also be used with the Talent Insights Assessment (DISC and Motivator).
- Assessment results should be considered 40% of any management decision.
- Contact Suite Price with questions or suggestions. [suite@pricetessolutions.com](mailto:suite@pricetessolutions.com)

### STEP 1: STREAMLINED COACHING REPORT:

Ensure that the PWA has a streamlined **TriMetrix Coaching™** Report. **"PWA is the coachee, the Person with the Assessment."** If you have a shortlisting Talent Report or a long Coaching Report, contact us and we'll show you how to convert a report to a streamlined coaching report. It is quick and easy.

**STEP 2: SEND PRE-WORK TO PWA.** Send the pre-work email to the PWA several days before your onboarding or coaching meeting. (Review includes reviewing the assessment, making notes, and watching the Strength Revealer Overview video.)

### "PWA Pre-Work Sample Email Message and Link:

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3. Bring your questions and insights to our follow-up conversation on **DATE/TIME**.

If you have ANY questions before our scheduled call, please do not hesitate to call or email me. I look forward to reviewing this with you and spending time with you!



### STEP 3: RESOURCES FOR ONBOARDING AND COACHING

#### ONBOARDING:

- Use this **SAMPLE ONBOARDING COACHING AGENDA** (with the streamlined coaching report) with any employee. It is not just for New Hires. Facilitate engagement, a self-paced development plan, and build a stronger working relationship with anyone who has joined the team.
- Share this onboarding document with leaders: **32 Ideas, Tips, Actions to Add to Your Onboarding Process**

**COACHING:** If this is a coaching relationship – consider adding the following tools to your strings with PWA:

- **CREATE A POSITION BENCHMARK:**
  - o Work with the PWA's Manager to create a Position Benchmark, using the **Superior Performance Attributes Worksheet**. Once the top attributes for success in the role have been selected, compare the PWA assessment results to the Benchmark. Assess strengths and blind spots.
- **CREATE A DEVELOPMENT PLAN AND USE TRIMETRIX UNIVERSITY LEARNING BITES**
  - o Work with PWA to create a **TriMetrix Online Development Plan** document to highlight vital **TriMetrix** areas and track actions.
  - o Use **TriMetrix University Learning Bites** for coaching resources and activities.

A stands for Person with Assessment. If the Manager is not available, work with PWA and use your knowledge to create a Position Benchmark for coaching purposes.

#### 4. ADDITIONAL KEY COACHING RESOURCES

Side-by-Side report and Triad Calls are great facilitation tools for Onboarding, Leader Initiation, and Conflict Management.

- **SIDE-BY-SIDE REPORT:** Help two people work together more effectively. See a sample report and use this **sample plan** to facilitate conversation and understanding.
- **FACILITATE A TRIAD CALL** (**Triad Call Plan, Facilitator Notes, and Sample Email**) with the PWA, Manager & Facilitator: This 60 – 90-minute call is powerful. Common Manager comments, "I've seen immeasurable change and improvement."
- **QUICK, DETAILED SUPPORT REFERENCE CARDS FOR COACH AND PWA:** [Motivator Memory Jogger Card](#) [How Each Motivator Reacts in Crisis](#) [DISC Memory Jogger Card](#)

Page | 2

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## Onboarding with TriMetrix -Four Step Process

1

New Hire TriMetrix Coaching Report

2

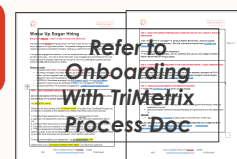
Send New Hire Email and Report

3

Meet with New Hire, Follow Agenda

4

Share Resources and Check-In



18

## TriMetrix Coaching Process in Four Steps:



Helping you create a  
**Wake Up Eager** life.  
[www.pricelessprofessional.com](http://www.pricelessprofessional.com)

### Wake Up Eager Employee/Leader

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- These processes can also be used with the Talent Insights Assessment (DISC and Motivators).
- Assessment results should be considered <30% of any management decision.
- Contact Suzie Price with questions or suggestions. [suzie@pricelessprofessional.com](mailto:suzie@pricelessprofessional.com)

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## TriMetrix Coaching Process in Step 1 of 4:

### STEP 1: STREAMLINED COACHING REPORT.

Ensure that the PWA\* has a streamlined **TriMetrix** Coaching\*\* Report.

**\*PWA is the coachee, the Person with the Assessment.**

**\*\*If you have a short hiring Talent Report or a long Coaching Report, contact us and we'll show you how to convert a report to a streamlined coaching report. It is quick and easy.**

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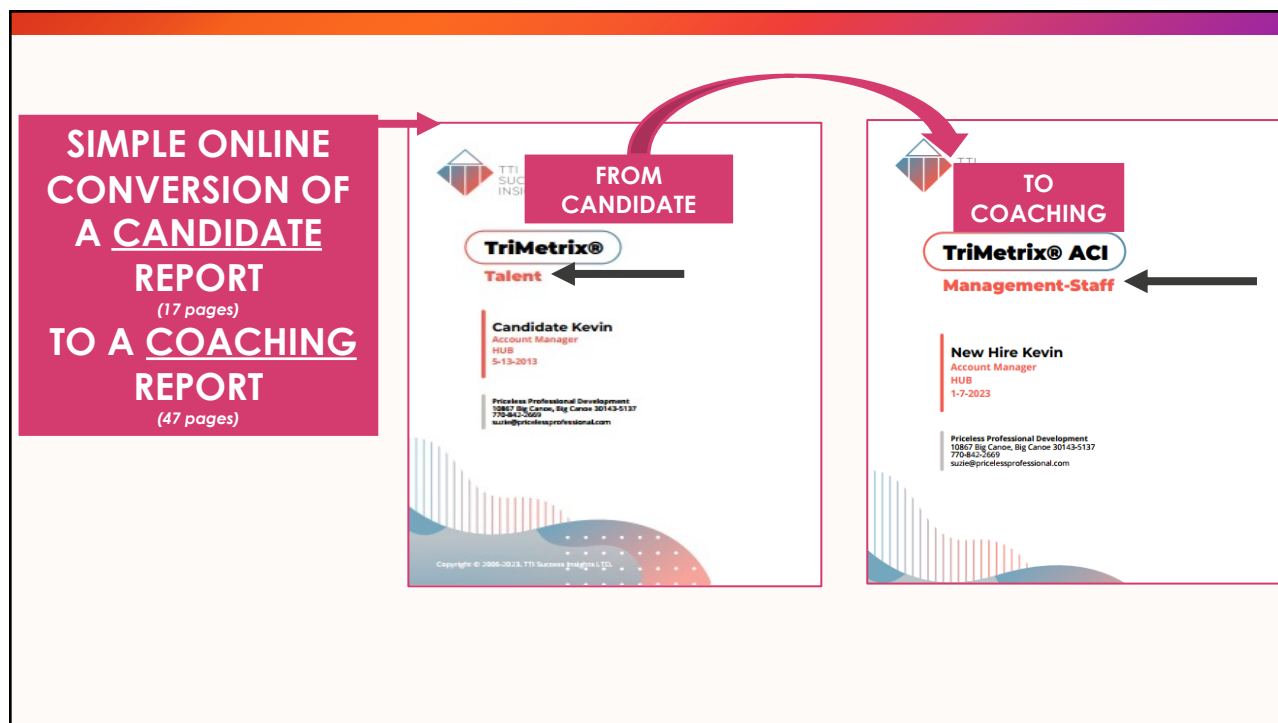
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If you have ANY questions before our scheduled call, please do not hesitate to call or email me. I look forward to reviewing this with you and spending time with you!

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## TriGrap

Figure 1: Behavioral Hierarchy graph showing 12 areas commonly encountered. The graph displays 12 bars representing different behavioral areas, with the highest values (99) for Interaction and People-Oriented, and the lowest (64) for Urgency. The bars are color-coded: red for Interaction, yellow for People-Oriented, green for Versatile, blue for Frequent Change, orange for Customer-Oriented, purple for Urgency, and grey for Competitive, Traditional/Regulatory, and Aesthetic.

Area	Mean
1. Interaction - Frequent others.	99
2. People-Oriented - Build relationships with individuals.	99
3. Versatile - Adapt to various situations.	94
4. Frequent Change - Rapidly changing environments.	94
5. Customer-Oriented - Meet customer expectations.	94
6. Urgency - Take immediate action.	64
7. Competitive - Want to win.	94
8. Traditional/Regulatory - Follow established traditions.	94
9. Aesthetic - Creative self-expression.	94
10. Utilitarian/Economic - Reward accomplishments.	94
11. Individualistic/Political - Personal recognition.	94
12. Theoretical - Rewards knowledge's sake.	94

## Behavioral

The Behavioral Hierarchy graph twelve (12) areas commonly encountered areas you will naturally be most

### 1. Interaction - Frequent others.

0 10 20 30 40

### 2. People-Oriented - Build relationships with individuals.

0 10 20 30 40

### 3. Versatile - Adapt to various situations.

0 10 20 30 40

### 4. Frequent Change - Rapidly changing environments.

0 10 20 30 40

### 5. Customer-Oriented - Meet customer expectations.

0 10 20 30 40

### 6. Urgency - Take immediate action.

0 10 20 30 40

### 7. Competitive - Want to win.

0 10 20 30 40

## Personal Interests

Your motivation to succeed in anything you energized and successful at work when you below from the highest to the lowest.

### 1. Utilitarian/Economic - Reward accomplishments, results and time, resources and energy.

0 10 20 30 40 50

### 2. Individualistic/Political - Reward personal recognition, freedom, and destiny and others.

0 10 20 30 40 50

### 3. Theoretical - Rewards those who value knowledge's sake, continuing education growth.

0 10 20 30 40 50

### 4. Social - Rewards those who value service to others and contribute to being of society.

0 10 20 30 40 50

### 5. Traditional/Regulatory - Rewards traditions inherent in social structure principles.

0 10 20 30 40 50

### 6. Aesthetic - Rewards those who value creative self-expression, beauty and

## Personal Skills

Your unique hierarchy of skills reaching your goals

### 1. Results Orientation - Necessary to do

0 10 20

### 2. Planning - A process for achieving systems, procedures

0 10 20

### 3. Conceptualization - Situations or a

0 10 20

### 4. Empathy - Understand the

0 10 20

### 5. Flexibility - Integrate change

0 10 20

### 6. Decision Making - Situation to gain

0 10 20

## Core Skills List

For consulting and coaching

### Clarity Mean Description

99	80	Following Directions
99	80	Respect for Policies
95	78	Monitoring Others
94	83	Theoretical Problem Solving
94	76	Concrete Organization
94	78	Systems Judgment
92	81	Self Improvement
91	73	Surrendering Control
90	73	Results Orientation
90	79	Correcting Others
89	76	Using Common Sense
89	71	Role Confidence
88	80	Attention to Detail
88	75	Quality Orientation
86	73	Conceptual Thinking
86	81	Understanding Motivational Needs
86	81	Empathetic Outlook
85	74	Project and Goal Focus
85	82	Realistic Goal Setting for Others
85	79	Proactive Thinking
85	79	Emotional Control
85	77	Evaluating What is Said
84	77	Realistic Expectations
84	75	Problem Solving
84	78	Relating to Others
84	77	Sense of Belonging
84	80	Practical Thinking
83	79	Conveying Role Value
82	77	Evaluating Others
82	73	Sense of Self
82	80	Material Possessions
81	70	Intuitive Decision Making
81	79	Attitude Toward Others
81	78	Freedom from Prejudices
81	74	Developing Others
81	73	Project Scheduling
81	79	Sensitivity to Others
81	81	Personal Relationships
80	76	Integrative Ability
79	72	Personal Accountability
79	67	Self Assessment
79	76	Long Range Planning
79	75	Sense of Timing
78	69	Self Direction

### Clarity Mean Description

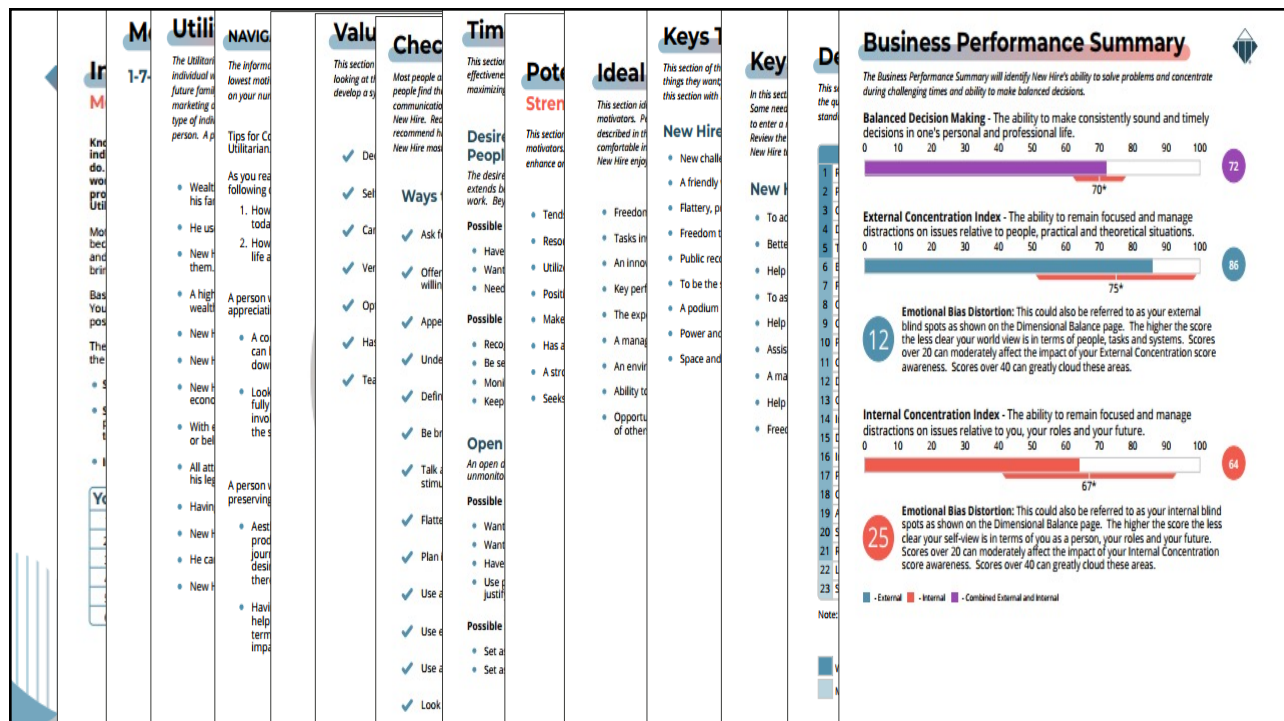
76	75	Accountability for Others
76	79	Leading Others
76	78	Persuading Others
75	74	Self Confidence
75	74	Handling Rejection
75	72	Persistence
75	74	Self Management
74	69	Meeting Standards
74	76	Status and Recognition
73	71	Personal Drive
72	70	Balanced Decision Making
72	71	Internal Self Control
71	71	Gaining Commitment
70	76	Realistic Personal Goal Setting
69	74	Enjoyment of the Job
68	73	Sense of Mission
66	73	Consistency and Reliability
66	73	Job Ethic
66	69	Initiative
65	70	Handling Stress
64	71	Role Awareness

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\* 68% of the population falls within this range

22\*

22



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## New Hire Kevin's Coaching Report...

### Ideal Environment

This section identifies the ideal work environment based on New Hire's basic style and top two motivators. People with limited flexibility will find themselves uncomfortable working in any job not described in this section. People with flexibility use intelligence to modify their behavior and can be comfortable in many environments. Use this section to identify specific duties and responsibilities that New Hire enjoys and also those that create frustration.

- Freedom of movement.
- Tasks involving motivated groups and establishing a network of contacts.
- An innovative and futuristic-oriented environment.
- Key performance measured on results and efficiency rather than people and process.
- The experience is seen as a part of the desired return on investment.
- A manager that brings people and excitement into the act of doing business.
- An environment where he can "lead the parade".
- Ability to be self-starting and forward looking as it relates to challenging the status quo.
- Opportunity to assertively express his desire to control his own destiny and potentially that of others.

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## New Hire Kevin's Coaching Report...

### Keys To Motivating



*This section of the report was produced by analyzing New Hire's wants. People are motivated by the things they want; thus wants that are satisfied no longer motivate. Review each statement produced in this section with New Hire and highlight those that are present "wants."*

#### New Hire wants:

- New challenges and problems to solve.
- A friendly work environment.
- Flattery, praise, popularity and strokes.
- Freedom to get desired results through efficiency and a "can do" attitude.
- Public recognition of financial rewards for returns and efficiency.
- To be the spokesperson for team and organizational accomplishments.
- A podium to express ideas, vision and experiences.
- Power and control over outcomes and goals.
- Space and latitude to do what it takes to get the job done.

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## New Hire Kevin's Coaching Report...

### Keys To Managing



*In this section are some needs which must be met in order for New Hire to perform at an optimum level. Some needs can be met by himself, while management must provide for others. It is difficult for a person to enter a motivational environment when that person's basic management needs have not been fulfilled. Review the list with New Hire and identify 3 or 4 statements that are most important to him. This allows New Hire to participate in forming his own personal management plan.*

#### New Hire needs:

- To adjust his intensity to match the situation.
- Better organization of record keeping.
- Help on controlling time and setting priorities.
- To assess the risk and rewards of each decision.
- Help balancing the desire for return and the need for people interactions.
- Assistance in establishing realistic expectations of others in order to maximize contributions.
- A manager that recognizes his need for public recognition of accomplishments.
- Help understanding the effect on his image when he disengages from uncontrolled projects.
- Freedom to determine how results should be achieved.

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## Onboarding with TriMetrix -Four Step Process

1

New Hire TriMetrix Coaching Report

2

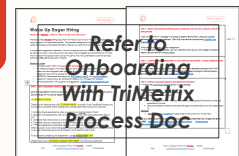
**Send New Hire Email and Report**

3

Meet with New Hire, Follow Agenda

4

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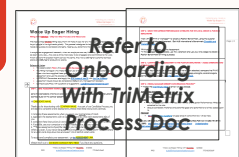
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3

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28

## TriMetrix Coaching Process in Step 2 of 4:

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## A Guide for reviewing Your TriMetrix Assessment Results...

(The link to this is in the sample pre-work email.)

### A Guide for Reviewing Your TriMetrix Assessment Report

1. Your TriMetrix Assessment includes three different assessments that measure three different views of a person:
  - a. **DISC Behavioral Style** – This assessment shares insight around your “style.” It is how others may see you and describe you.
  - b. **Workplace Motivators** – This assessment reveals what gives you energy and naturally interests you. Your motivators are not easily seen or observed by others.
  - c. **Acumen** – This assessment shares top personal skill competencies and potential areas of development. It’s a snapshot of how you are thinking, feeling and making decisions.
2. As you read your report, resist the temptation to be hard on yourself. **Be on the lookout for your strengths.** Knowing what your strengths are matters. And we’ll be looking for them together...
3. You also want to focus only on development areas that are hindering your ability to reach your goals.
4. If you find areas in your Report that seem as though they are describing someone else, and it just doesn’t seem like you, you may be right. Or it could be a blind spot. Do not ‘throw the insight away’ until you’ve reviewed it with someone who knows you well. (Sometimes we just don’t see the blind spot---and sometimes, it just isn’t true for you.) **Conduct research before** you discount something that could be useful insight for you and your career.
5. A Reminder: Do not try to digest this information all at once.
6. **Guidelines to Prepare for Our First Coaching Call: Read your Report and make the following notations on areas that stand out for you:**
  - o (star) = “I agree with this point whole-heartedly.”
  - o (X) = “I absolutely do not agree with this point.”
  - o (?) = “I want to find out more about this point/area.”
7. Finally, keep a sense of humor! Be prepared to laugh and embrace your strengths AND your development opportunities. They are what make you the special, unique you that you are!

*“Your talents, your strongest synaptic connections, are the most important raw material for strength building. Identify your most powerful talents, hone them with skills and knowledge, and you will be well on your way to living the strong life.”*

Now, Discover Your Strengths

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## A Guide for reviewing Your TriMetrix Assessment Results...

### What is measured...

A Guide for Reviewing Your TriMetrix Assessment Report

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## A Guide for reviewing Your TriMetrix Assessment Results...

### Setting Perspective... Reducing Resistance...

A Guide for Reviewing Your TriMetrix Assessment Report

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## A Guide for reviewing Your TriMetrix Assessment Results...

### A Guide for Reviewing Your TriMetrix Assessment Report

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- a. **Personality** – This assessment reveals what you are like in your “style.” It is your “style.” It is
- b. **Workplace Motivators** – This assessment reveals what gives you energy and

### Actions to Take...

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**TriMetrix® ACI**  
**Management-Staff**

**New Hire Kevin**  
Account Manager  
HUB  
1-7-2023

Priceless Professional Development  
10867 Big Canoe, Big Canoe 30143-5137  
770-842-2669  
suzie@pricelessprofessional.com


## Debrief Video:

☒  
  
☐  
  
☐

TRAINING

**priceless**

**Strength Revealers**  
Understanding Your Assessment Results



00:14

[www.pricelessprofessional.com/myassessment](http://www.pricelessprofessional.com/myassessment)

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## Strength Revealer Video and Self-Paced Dev Resources...

[www.pricelessprofessional.com/myassessment](http://www.pricelessprofessional.com/myassessment)



### TriMetrix or Talent Insights Self-Paced Assessment Resources

**Jump To:** [Video - Understanding My Assessment](#)

**Jump To:** [Key Debrief Tools](#)

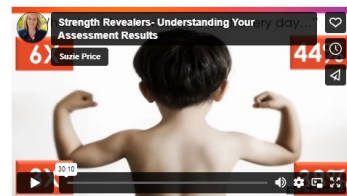
**Jump To:** [Development Plan Worksheet](#)

**Jump To:** [Learning Bites - TriMetrix University](#)

**Jump To:** [Additional Assessment-Related Dev Tools](#)

#### ① Video - Understanding My Assessment

Watch this video to begin to understand your assessment results:



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## Strength Revealer Video and Self-Paced Dev Resources...

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## Onboarding with TriMetrix -Four Step Process

1

New Hire TriMetrix Coaching Report

2

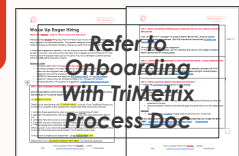
Send New Hire Email and Report

3

Meet with New Hire, Follow Agenda

4

Share Resources and Check-In



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## TriMetrix Coaching Process in Step 3 of 4, Part 1:

### STEP 3: RESOURCES FOR ONBOARDING AND COACHING

#### ONBOARDING:

- Use this SAMPLE [ONBOARDING COACHING AGENDA](#) (with the streamlined coaching report) with any employee. It is not just for New Hires. Facilitate engagement, a self-paced development plan, and build a stronger working relationship with anyone who has joined the team.
- Share this onboarding document with leaders: [32 Ideas, Tips, Actions to Add to Your Onboarding Process](#)

COACHING: If this is a coaching relationship – consider adding the following tools to your meetings with PWA:

- CREATE A POSITION BENCHMARK:
  - Work with the PWA's Manager\* to create a Position Benchmark, using the [Superior Performance Attributes Worksheet](#). Once the top attributes for success in the role have been selected. Compare the PWA assessment results to the Benchmark. Assess strengths and blind spots.
- CREATE A DEVELOPMENT PLAN AND USE TRIMETRIX UNIVERSITY LEARNING BITES
  - Work with PWA to create a [TriMetrix Online Development Plan](#) document to
    - highlight vital [TriMetrix](#) areas and track actions.
  - Use [TriMetrix University Learning Bites](#) for coaching resources and activities.

\*PWA stands for Person with Assessment

\*\*If the Manager is not available, work with PWA and use your knowledge to create a Position Benchmark for coaching purposes.

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## ONBOARDING COACHING AGENDA... Session 1 of 3

**YOUR FOCUS:**  
Get to know your  
new hire.

### Getting New Hires to Stay, An Onboarding Tool – Sample Agenda for Managers

Provided By: Suzie Price, February 2022

Provide your New Hire with their customized Coaching Report during their first week on the job. Share the Debrief Video link with them and communicate in advance that you will be meeting for three different sessions to learn more about each other and how to best work together.

Before each session: You will both want to read each section in advance. The New Hire should be ready to share areas of their results that they would like you to know. As the Manager, you will want to be ready to share what you learned about your New Hire and ask any questions.

#### Session #1:

- **Intro and Check-in:** Ask your New Hire – “How are things going? What’s going well? What could be going better? How can I help?”
- **Icebreaker:** “Think of all of the people who’ve influenced you as you were growing up, who had the most influence on you?” Both share your answers.
- **Assessment Review and Discussion:**
  - In each section, ask your New Hire to share the key points from each h/she most wants to share, and also to share why it’s important and why it stands out.
  - Make notes **listen to understand**, ask questions about what is transferred and about something you noticed in the assessment.
    - Discuss Top Motivators (Interests) on the Motivators Wheel, pages 3, 4, 5
    - Refer to the [Motivators Memory Jogger Card](#) and discuss this person’s top two Motivators.
    - Review Behavioral Characteristics together, pages 17 & 18. Discuss what your employee agrees with and disagrees with.
    - Review Checklist for Communicating, pages 19 & 20. What two tips on each page are most important to this person? And why?
- **Close:** Each share what was most useful to you during the conversation. Schedule your next meeting.

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## ONBOARDING COACHING AGENDA... Session 2 of 3

**YOUR FOCUS:**  
Get to know  
your new hire.

#### Session #2:

- **Intro and Check-in:** Ask your New Hire – “How are things going? What’s going well? What could be going better? How can I help?”
- **Assessment Review and Discussion:**
  - In each section, ask your New Hire to share the key points from each h/she most wants to share, and to share why it’s important and why it stands out.
  - Make notes **listen to understand**, ask questions about what is shared and about something you noticed in the assessment.
    - Review pages 22 – 26: Integrating Behaviors and Motivators – Strengths, Conflict, Ideal Environment, Keys to Motivating, and Keys to Managing.
      - In each Section, ask your New Hire to share the key points from each h/she most wants to share, and also to share why it’s important and why it stands out.
- **Close:** Each share what was most useful to you during the conversation. Schedule your next meeting.

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## ONBOARDING COACHING AGENDA... Session 3 of 3

YOUR FOCUS:  
Get to know  
your new hire.

### Session #3:

- **Intro:** Ask your New Hire – “How are things going? What’s going well? What could be going better? How can I help?”
- **Assessment Review and Discussion:**
  - Review pages 28 – 32: Competencies
    - Point out the top 7 Personal Skills – greatest strengths. Discuss how those strengths can be used on the job.
    - Look at lower scoring Personal Skills – remind them that no one has aced all of these. Ask (or point out) an area or two that will be important to the job and discuss ideas for developing that area. (Be sure to provide them with our [TriMetrix Learning Bites](#), self-paced development resources.)
- **Close:** Each share what was most useful to you during the conversations and determine the next steps.

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## Client Feedback from an Initially Resistant COO

*"I found the TriMetrix On-Boarding Assessment process **very helpful** as I came on board as Chief Operating Officer at TPI Hospitality. My new team of 13 all had long tenure within the organization.*

*Having their assessment results and Suzie facilitating one-on-one triad conversations **helped us all understand our strengths, drivers, preferences and blind spots and how to best work together.***

*I continue to **refer to my team's assessments**, our side-by-side results, and the team's one-page reference sheet **to guide how I lead**, manage and better relate to each team member.*

***It's been effective and worth the time."***

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## Onboarding with TriMetrix -Four Step Process

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New Hire TriMetrix Coaching Report

2

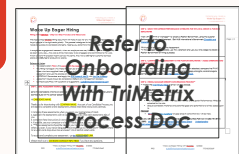
Send New Hire Email and Report

3

Meet with New Hire, Follow Agenda

4

Share Resources and Check-In



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## TriMetrix Coaching Process in Step 3 of 4, Part 2:

### STEP 3: RESOURCES FOR ONBOARDING AND COACHING

#### ONBOARDING:

- Use this SAMPLE [ONBOARDING COACHING AGENDA](#) (with the streamlined coaching report) with any employee. It is not just for New Hires. Facilitate engagement, a self-paced development plan, and build a stronger working relationship with anyone who has joined the team.
- Share this onboarding document with leaders: [32 Ideas, Tips, Actions to Add to Your Onboarding Process](#)

COACHING: If this is a coaching relationship – consider adding the following tools to your meetings with PWA:

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- CREATE A DEVELOPMENT PLAN AND USE TRIMETRIX UNIVERSITY LEARNING BITES
  - Work with PWA to create a [TriMetrix Online Development Plan](#) document to
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  - Use [TriMetrix University Learning Bites](#) for coaching resources and activities.

\*PWA stands for Person with Assessment

\*\*If the Manager is not available, work with PWA and use your knowledge to create a Position Benchmark for coaching purposes.

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# Online Development Worksheet:

## Introduction

Your Personal Development Plan employs a concept that emphasizes specific developmental experiences to fulfill the mutual goals of your individual career development and organizational enhancement. Your plan is uniquely tailored to your individual needs.

The Personal Development Plan is a personal action plan that helps you to identify the training and other developmental experiences needed to master the soft skills that will optimize your career potential within a specified timeframe.

The goal of this Personal Development Plan is to assist you in developing your skill-set to bring your scores up to desired level. As you know, your areas for development were identified in your TriMetrix® HD Job/Talent Comparison Report.

The first step in your development process should be to identify an activity partner or mentor/coach. Their role is not only to help you identify specific developmental activities to help you master each identified area, but to also offer guidance, wisdom, experience and encouragement.

All development plans require:

- Goals
- Timeframes
- Action steps/methods
- Evaluation

Keep these in mind as you work with your activity partner in putting your detailed plan together.

Your development areas include:

### Competencies

- Goal Achievement
- Interpersonal Skills
- Leadership
- Personal Accountability
- Resiliency
- Self Management
- Customer Focus

### Motivators

- Utilitarian/Economic
- Theoretical
- Individualistic/Political

### Behaviors

- Urgency
- Competitive
- People-Oriented

## Goal Achievement

The ability to identify and prioritize activities that lead to a goal.

- Establishes goals that are relevant, realistic and attainable
- Identifies and implements required plans and milestones to achieve specific business goals
- Initiates activity toward goals without unnecessary delay
- Stays on target to complete goals regardless of obstacles or adverse circumstances

Based on your competency rating compared to the requirements of your job, check the word that best indicates the amount of effort you will have to put forth to master "Goal Achievement".

☐ Significant

☐ Moderate

### Evaluation/Measurables

How am I going to feel when I've improved my abilities and mastered "Goal Achievement"?

---

---

What impact will mastery have on my career or personal life?

---

---

What will I hear others say about me after I master "Goal Achievement", with regard to my skill and development?

---

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Development  
Tools for You:

learning  
bites

[www.pricelessprofessional.com/learningbites](http://www.pricelessprofessional.com/learningbites)

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## TriMetrix Coaching Process in Step 4 of 4:

### STEP 4: ADDITIONAL KEY COACHING RESOURCES

The Side-by-Side report and Triad Calls are great facilitation tools for Onboarding, Leader Assimilation, and Conflict Management.

- **SIDE-BY-SIDE REPORT:** Help two people work together more effectively. See a sample report and use this [sample plan](#) to facilitate conversation and understanding.
- **FACILITATE A TRIAD CALL** ([Triad Call Plan](#), [Facilitator Notes](#), and [Sample Emails](#)) with the PWA, Manager & Facilitator: This 60 – 90-minute call is powerful. Common Manager comments, "I've seen immeasurable change and improvement."

**QUICK, DETAILED SUPPORT REFERENCE CARDS FOR COACH AND PWA:**  
[Motivator Memory Jogger Card](#)    [How Each Motivator Reacts in Crisis](#)  
[DISC Memory Jogger Card](#)

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## TriMetrix Onboarding and Coaching Reference Document

### Wake Up Eager Employee/Leader

Onboarding and Coaching with [TriMetrix](#) - Step-by-Step Process and Resources

This step-by-step Onboarding and Coaching process and the related resources document will make it easy for any manager to quickly understand how to best motivate, manage and communicate with each employee.

According to employee engagement research, managers who take time to demonstrate that they care, focus on strengths, and provide growth and development opportunities for their employees have less turnover and higher commitment.

#### Reference Notes:

- The person with an assessment is the [coachee](#), and will be referred to as PWA.
- We recommend using our [streamlined Coaching Report](#) (sample report) so that no assessment training is needed to discuss results and determine the next steps.
- Consider using this process for your growth. The best [TriMetrix](#) Coaches are those who understand their results.
- These processes can also be used with the Talent Insights Assessment (DISC and Motivators).
- Assessment results should be considered *GOI* of any management decision.
- Contact Suite Price with questions or suggestions. [suite@policesuccessprofessional.com](mailto:suite@policesuccessprofessional.com)

#### STEP 1: STREAMLINED COACHING REPORT

Ensure that the PWA has a streamlined [TriMetrix Coaching](#)™ Report.

"PWA is the [coachee](#), the Person with the Assessment."  
"If you have a short-term Talent Report or a long Coaching Report, contact us and we'll show you how to convert a report to a streamlined coaching report. It is quick and easy."

**STEP 2: SEND PRE-WORK TO PWA** (Send the pre-work email to the PWA several days before your onboarding or coaching meeting. (Revivate includes reviewing the assessment, making notes, and watching the Strength Revealer Overview video.)

#### "PWA Pre-Work Sample Email Message and Link:

Thank you for completing the online assessments attached are your results. Here are your next steps:

1. Read the [Guidelines for Reviewing Your Results](#) and review your Assessment. Make notes where you have questions and around the areas you are curious about.
2. Watch the [Strength Revealer Video](#) on how to read and understand your results.
3. Bring your questions and insights to our follow-up conversation on [DATE/TIME](#).

If you have ANY questions before our scheduled call, please do not hesitate to call or email me. I look forward to reviewing this with you and spending time with you!

### STEP 3: RESOURCES FOR ONBOARDING AND COACHING

#### ONBOARDING:

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A stands for Person with Assessment  
If the Manager is not available, work with PWA and use your knowledge to create a Position benchmark for coaching purposes.

#### 4. ADDITIONAL KEY COACHING RESOURCES

Side-by-Side report and Triad Calls are great facilitation tools for Onboarding, Leader Assimilation, and Conflict Management.

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**learning  
bites**

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## Onboarding with TriMetrix -Four Step Process

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Share Resources and Check-In

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## Podcast: Getting New Hires to Stay

### 3 Reasons

Why Your Need  
New Hires to Stay

#### MARKET CONDITIONS

Low unemployment coupled with  
competitive salaries and market.

#### COST OF TURNOVER

Costs of turnover are nearly 1.5x that  
position's salary.

#### POOR NEW HIRE PROCESS

25% of organizations don't have an  
onboarding process.

### 3 Things

to Focus on During  
Onboarding

#### REDUCE FEAR

Eliminate any apprehension by  
overcommunicating background.

#### INCREASE UNDERSTANDING

Create a performance dashboard  
including five core competencies.

#### GIVE THEM WHAT THEY NEED

Provide enough direction to let  
them start driving immediately.



WAKE UP EAGER WORKFORCE  
PODCAST WITH SUZIE PRICE



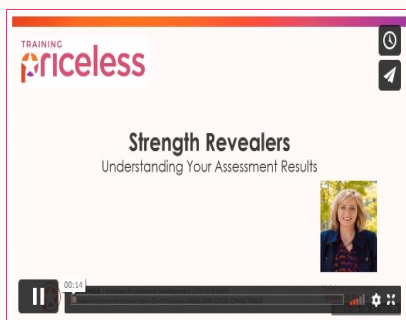
EPISODE  
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[www.pricelessprofessional.com/myassessment](https://www.pricelessprofessional.com/myassessment)



## FOR ALL EMPLOYEES:

100+ tools and resources for  
development

- Strength Revealers – Debrief Video
- Key Debrief Tools
- **Development Plan Worksheet**
- **TriMetrix University\*\***
- **Leadership Development**

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# TriMetrix BASICS

## Listen, Watch, or Read:

### Episode 81: Hiring with TriMetrix

[pricelessprofessional.com/hiringwithtrimetrix](http://pricelessprofessional.com/hiringwithtrimetrix)





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## You Must Know:

“Are they (you) going to be **happy**?

Are they (you) going to be **productive**?

Will they (you) want to **stay**?

Will they (you) **own their** (your) **job**?

Will they **contribute their** (you) **talent**  
**generously**?”

**Dr. Robert S. Hartman**  
Founder of the Science of Axiology

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