# **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 recommended using our [streamlined Coaching Report](https://wakeupeager.s3.amazonaws.com/Hire_Harry_New_STREAMLINEDREPORT_NEW_2022.pdf) (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 <30% of any management decision.
* Contact Suzie Price with questions or suggestions. suzie@pricelessprofessional.com

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| **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.  |
| **STEP 2:** **SEND PRE-WORK TO PWA.** Send the pre-work email\* to the PWA several days before your onboarding or coaching meeting. (Pre-work includes reviewing the assessment, making notes, and watching the Strength Revealer Overview video.)\*PWA Pre-Work Sample Email Message and Links: Thank you for completing the online assessments; attached are your results. Here are your next steps:1. Read the [Guidelines for Reviewing Your Results](https://suzies-hard-drive.s3.amazonaws.com/TriMetrix_ReportReminders_2024.pdf) and review your Assessment. Make notes where you have questions and around the areas, you are curious about.
2. Watch the [Strength Revealer Video](https://www.pricelessprofessional.com/self-paced-assessment-resources.html) on reading and understanding 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: * Use this SAMPLE [ONBOARDING COACHING AGENDA](https://wakeupeager.s3.amazonaws.com/GettingNewHiresToStay_HUBAssessment_SampleAgenda_OnboardingResource_August2023_MASTER.docx) (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](https://s3.amazonaws.com/wakeupeager/Additional_NewHire_ActionsGreatManagersTake.docx)

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 Job Template, using the [Superior Performance Attributes Worksheet](https://wakeupeager.s3.amazonaws.com/TriMetrix_Debrief_Notes_Worksheet_2022_Fillable.pdf). 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](http://www.ttidevelopment.com/) document to
		- highlight vital TriMetrix areas and track actions.
	+ Use [TriMetrix University Learning Bites](https://www.pricelessprofessional.com/trimetrix-university-development-insights-general-use.html) 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.* |
| **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](https://s3.amazonaws.com/wakeupeager/Side-by-Side_SampleReport__Agenda.pdf) to facilitate conversation and understanding.
* FACILITATE A TRIAD CALL ([Triad Call Plan, Facilitator Notes, and Sample Emails](https://suzies-hard-drive.s3.amazonaws.com/Triad_Call_Process_WhatWhyHow_2022.docx)) 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](https://wakeupeager.s3.amazonaws.com/Motivators_MJCard_2021.pdf) [How Each Motivator Reacts in Crisis](https://wakeupeager.s3.amazonaws.com/Motivators_in_a_Crisis_2021.pdf)[DISC Memory Jogger Card](https://wakeupeager.s3.amazonaws.com/DISC_CommunicationTips_MJCard_2021.pdf) |