

10 Step process for evaluation meeting

To engage in more effective evaluation or developmental or exploratory conversations with your team or aspiring leaders or job applicants or potential promotions this 10 Step process provides a framework or check list to make sure everything gets covered.

You may choose to change some of the wording to fit the particular situation making the steps relevant.

Remember that listening is one of the key elements to any successful, rewarding conversation.

10 steps process:

1. **Make a connection and set up your conversation for success:**
 - Set the scene with any pre-meeting preparation to be done. Let's explore some interesting, meaningful questions about your business / work.
2. **Get a quick snapshot of where they are now:**
 - Ask 'How about giving a headline description of your business / work / biggest headache/ priority challenge.'
3. **Uncover what they want most:**
 - 'If you could have everything you want in your business / work / life in next 6 months, what would that look and feel like?' Be curious as to the detail.
4. **Help them connect emotionally to their vision:**
 - 'What would achieving this do for you? And what else? And what else? How important would you say this is for you on a scale of 1 – 10 where 1 is not at all and 10 absolutely?'
5. **Ask them to list their challenges or obstacles:**
 - 'What's stopping you having it right now? And what else? And what else?' Resist the impulse to tell them!
6. **Help them realise the impact of living with the status quo:**
 - 'What has it cost you not having it? What effect has that had on you?'
7. **Show them the bigger why:**
 - 'If you could overcome that challenge or obstacle [*state what it was in their words*] what would that do for you? And what else?'
8. **Gather the gems:**
 - 'What have you taken away from our conversation so far?'
9. **Invite them in:**
 - 'Are you ready to hear how I can help you achieve your [*insert specific dream / goal*]? If yes, share coaching approach / fees & terms / weave in benefits of working with you / share success stories. If no ask what more information they need to know that it is right for them.
10. **Create sense of urgency:**
 - Ask: what next steps are and by when. Agree to confirm everything by email.