



## Associate Monthly Coaching and Review

Associate: \_\_\_\_\_

| MONTH     | MTD SALES \$ | MTD SALES %<br>VAR GOAL | YTD SALES \$ | YTD SALES %<br>VAR GOAL | # MONTHS<br>MADE GOAL | AVG SALE | UPT | CREDIT % | PODIUM<br>REVIEWS |
|-----------|--------------|-------------------------|--------------|-------------------------|-----------------------|----------|-----|----------|-------------------|
| ASSOCIATE |              |                         |              |                         |                       |          |     |          |                   |
| STORE     |              |                         |              |                         |                       |          |     |          |                   |

| CATEGORIES                 | ASSOCIATE<br>SCORING | MANAGER<br>SCORING | COMMENTS |
|----------------------------|----------------------|--------------------|----------|
| Hustle                     |                      |                    |          |
| Teamwork                   |                      |                    |          |
| 1) Prepare                 |                      |                    |          |
| 2) Greet                   |                      |                    |          |
| 3) Show Merchandise        |                      |                    |          |
| 4) Build Value             |                      |                    |          |
| 5) Handle Objections       |                      |                    |          |
| 6) Turnover                |                      |                    |          |
| 7) Close the Sale          |                      |                    |          |
| 8) Confirmations/Referrals |                      |                    |          |
|                            |                      |                    |          |
|                            |                      |                    |          |
|                            |                      |                    |          |

### 7 Performance Factors

1. Skill/Knowledge 2. Capacity 3. Resources 4. Feedback 5. Internal Motivation 6. Consequences 7. Clear Expectations

**ACTION PLAN - HOW MUCH AND BY WHEN**

**WHAT** - What are the two (2) high leverage categories that must improve over the next 30 days?

1. \_\_\_\_\_ 2. \_\_\_\_\_

**HOW** - What specific actions and/or development are required?

1. \_\_\_\_\_

2. \_\_\_\_\_

**WHEN** - When will the individual complete the “How” assignment?

1. \_\_\_\_\_ 2. \_\_\_\_\_

**HOW MUCH** - What improvement (outcome) is expected over the next 30 days?

**Other Comments:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

| This Month's Goals |          |     |          |        |                         |                        |                |
|--------------------|----------|-----|----------|--------|-------------------------|------------------------|----------------|
| Sales \$           | Avg Sale | UPT | Credit % | Podium | Supervisor Initial/Date | Associate Initial/Date | Follow-up Date |
|                    |          |     |          |        |                         |                        |                |