



# Performance Management

*Producing Manager's Guide to Coaching and Managing*

**"...the best boss I ever had."** That is a phrase most of us have said or heard at some point, but what does it mean? What sets a great manager apart from the average manager?

There are countless books and articles about the qualities of managers and leaders and whether the two differ; little has been said about what happens in the thousands of daily interactions and decisions that allow managers to get the best out of their people and win their devotion. *This workshop is about teaching you what great managers actually DO.*

In this interactive workshop, we will provide you with the real skills to answer the following questions:

- What areas do I need to improve to become a more effective manager?
- What is my most effective management style?
- What metrics do I track daily, weekly, monthly and annually?
- How do I better utilize metrics information to coach my people?
- Why don't my sales people do what I tell them to do?

This workshop is designed to help producers, team leaders and billing managers increase their effectiveness as managers and leaders. It will also contrast the traits of a big biller versus those of an effective manager, how proficiency in one does not constitute success in the other and how the lack of that realization can quickly create an environment of frustration, low productivity, and costly turnover.

## Program Benefits

**Multiple methods of learning:** Each workshop includes a workbook, live audio and visuals, role-plays, questions and answers, case study discussions and recommended video supplements.

**Personalized support:** Real-time trainers are on-line to coach each participant at every stage, and class size is limited to allow for ample participation and questions from each participant.

**Easily scheduled:** Sign in through a simple link sent to your e-mail address.

**No travel required:** Can easily fit into a busy schedule. There is no need to leave the office or even leave your desk.

**Attendees:** Designed for any producer in a management role, no matter the tenure.

**Session Length:** Each session covers one module and is approximately 60 minutes in length. Sessions are delivered once per week at the same time for six weeks.

## Performance Management Workshop Agenda

### Module 1: Blueprint for Change

The Change Model  
Recognizing your Strengths  
Clarifying your Values  
Creating your Vision

### Module 2: Leadership vs. Management

Leadership / Management / Coaching Defined  
Self Assessment  
The Complete Practice Diagnostic Checklist

### Module 3: Establishing Standards and KPI

Identifying Your Office Standards  
Performance Management Metrics  
The Roadmap for Assessing Metrics: P.A.R. Sheet and Kaizen Report  
Assessing Telephone Reports

### Module 4: Essential Coaching Skills

Effective Listening  
Making Guiding Suggestions  
Knowing the Right Plays vs. Announcing the Score

### Module 5: Critical Conversations

Course Correction  
Dealing with Ethical Issues  
Managing Up or Out

### Module 6: Creating a Coaching Culture

Critical Conversations – Your Turn  
Time Management  
Who's Coaching You?

## Performance Management: Details and Upcoming Dates

### Program Details

The Performance Management workshop runs for a 60 minute session each week.

### Program Cost

\$1,195 for non-NLE subscribers; includes Owner Therapy for duration of the course

\$895 for NLE subscribers without OT access; includes OT for one year

\$595 for NLE subscribers with OT access

## For More Information Contact

**Karen Schmidt**, Managing Partner

**Email:** [karen@nextlevelexchange.com](mailto:karen@nextlevelexchange.com)

**Direct:** 214.556.8000

**Website:** [www.nextlevelexchange.com](http://www.nextlevelexchange.com)