



## Coaching Guide for Managers of NAIC Designation Program Candidates

### Self Checklist

*Mark each task as you complete it. This will help you see your progress as a manager in helping each of your employees grow professionally.*

#### **Professional Development**

- I help my employees assess their existing capabilities.
- I discuss with each employee particular skills and concepts they should acquire.
- I provide opportunities for formal and informal instructive experiences for all of my employees.
- I review learning goals with each employee.
- I discuss with each employee how an instructive experience assisted them in achieving their goals.
- I provide opportunities for all of my employees to apply what they have learned on the job.

#### **Performance Goals**

- I set performance-oriented goals for my employees.
- I set an expectation on how skills learned in class will be applied.
- I set role-oriented goals for my employees.
- I set an expectation on how skills learned through the achievement of a Designation will be applied.

#### **Learning Dialogues**

- I select 1-3 units from a course that are most relevant to an employee's learning goals on which to focus a discussion.
- I ask targeted questions relating to new knowledge obtained, application strategies planned, and performance enhancements expected.

#### **Coaching and Feedback**

- I assist my employees in identifying or creating opportunities for them to practice new skills learned.
- I observe specific techniques or behaviors and discuss it with each employee.
- I explain to each employee why the technique or behavior observed was effective or ineffective.
- I explain the ultimate impact of specific techniques or behaviors with employees.
- I encourage my employees to identify suggestions for improvement or alternative methods to try next time.