

## EXPERT INSIGHTS



## Seven Keys to Sharing Individual Shop Results

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John Wooden said, “A coach is someone who can give correction without causing resentment.” The ability to improve performance by sharing member feedback is a skill that all great credit union coaches master. Whether you are sharing results of a MemberShop or another individual survey, use these keys to ensure that your coaching conversation leads to improvement and not to resentment.

### **Be prepared.**

Getting ready to share the results of a shop is just as important as the one-to-one meeting with your team member. Look over the shop in advance to see what the person did well and how the person could improve. Read the shopper comments. Make notes to keep yourself focused during the meeting.

### **Take a “big picture” view.**

As you’re preparing, compare the shop to the person’s previous shops. Are there any patterns in behavior? Remember, the shop is a snapshot of the person on a single transaction on a single day. Don’t focus on a low score on a single behavior unless the person is consistently scoring poorly for that behavior. For example, if a person has 8 shops and has used the member’s name on 7 of them, it will probably not be helpful to dwell on the fact that the person did not use the name this time. Everyone has a forgetful moment, and sometimes shoppers make mistakes. Focus on the fact that the person has done it right in the past and show faith that the person will do it right again in the future.

### **Be circumspect when sharing shopper comments.**

Rather than showing the person the shop or reading the shopper comments word-for-word, summarize to capture the essence of the shopper’s comments. For example, a shopper comment might say, “This employee did not smile or use my name. I felt like he or she didn’t

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like me for some reason. Maybe he was just having a bad day.” This is valuable feedback, but reflects the shopper’s feelings in addition to providing the shopper’s objective feedback on a specific behavior. One way to share this comment might be to say, “The shopper commented that they didn’t notice you smile or use their name. How might it make members feel when you don’t smile at them or use their names? Why is it so important to smile and member and use their names?”

### Keep it conversational.

Suppose you go to a doctor to have your cholesterol levels checked. A few days later you’re called in for the results. The doctor puts the numbers in front of you and asks you to sign a paper acknowledging that you have seen the results. You leave the office feeling confused. You wonder what the numbers mean, whether your health is in jeopardy, and how you can improve. Numbers are good for benchmarking and measuring improvement, but they do not substitute for coaching. Putting a written copy of a shop in front of a team member to read and sign is not coaching—it’s information dumping. Never share the results of a shop unless you have time to have a dialogue with your team member about the shop.

### Ask good coaching questions.

The best way to have a dialogue about a shop is to ask good coaching questions. Great coaching questions begin with the words “how” and “what.” These questions lead to a dialogue about performance improvement:

- *What led to your improvement in this area?*
- *What have you been doing differently that has helped you improve your score on Member Advocacy?*
- *What specific behaviors can you adopt that will make members feel more appreciated?*
- *The member gave you a “3” out of “5” on making them feel valued and respected. What specifically can you do to show members that you value and respect them?*
- *What can you do to make sure you remember to use the member’s name every time?*

**Focus on the positive.**

Don't use shop results to catch people doing it wrong. Most shops show that the person did more things right than wrong. Focusing only on the areas where a team member got a low score leads to resentment and a feeling of being unappreciated.

**Look for the one thing that would lead to the greatest improvement.**

Sometimes a team member scores poorly on a number of behaviors. If you ask the person to improve them all, he might be overwhelmed and simply give up. Rather than making a laundry list of improvements, focus on the one thing that would lead to the greatest improvement in the person's next shop. For example, a person who does not smile or make eye contact with members would see great improvement in her score just by changing those two behaviors. By creating focus on a single area you can show people that they have the power to improve their own performance, and you identify a single skill to coach to on a daily basis.

**Follow through.**

Unless the person has a perfect shop, always close the session by agreeing to a plan of improvement and then follow-through. When you catch the person exhibiting the agreed-upon behavior, let them know you've noticed. If you see them neglecting to use the behavior, provide immediate correction. Don't wait until the next shop to tell the person they are not doing it right. Sharing your observations shows the team member that the behavior is important to you and that you take great service seriously. If the only feedback team members get is from the shoppers, they will focus more on the measure and less on providing great service every time.