

Developing an Effective Working Relationship Instructions

(To be completed 1 month after the Building a Relationship Meeting)

The purpose of this process is to help the New or Current staff person improve their effectiveness on the job and their Direct Report in managing them more effectively based on their needs.

Documents Needed

TriMetrix DNA Mgt/Staff or Sales Report (Staff member only)

Developing an Effective Working Relationship Guide (Staff member only)

Step #1 – Guide to be completed by the New or Current staff member in a one week time frame

- Be sure the New or Current staff member has a copy of their TriMetrix DNA assessment.
- Give the New or Current staff member a copy of the “**Developing an Effective Working Relationship Guide**”.
- Inform the New or Current staff member that they need to complete the Guide as best they can in 1 week.
- Inform the new hire or current staff member that the categories in the Guide will be found in the TriMetrix DNA Report within pages 1–18 or 19 and 41– 43 or 44.

CATEGORIES: (Note: Page numbers below may vary in each persons report, but can be found in that area if different)

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|-----------------------|----------------------------|
| Time Wasters | (Report Pages 15-17 or 18) |
| Areas for Improvement | (Report Page 18 or 19) |
| Ideal Environment | (Report Page 41 or 42) |
| Keys to Motivating | (Report Page 42 or 43) |
| Keys to Managing | (Report Page 43 or 44) |

- **Direct Report schedules a 1 hour meeting with the New or Current staff member** for the week after process begins (Perhaps a lunch meeting?) This meeting will be to review their Guide only.

Step #2 – Direct Report 1 hour meeting with the New or Current staff member

- Remind the New or Current staff member to bring their Guide, a pencil or pen and their TriMetrix Report to the meeting.
- Direct Report reviews the Guide Sections one at a time with the New or Current staff member. Repeat this approach for each Guide Section one at a time. (Bring a pencil or pen to take notes and make changes as you proceed through the process)
- When the meeting is over, make a copy of the New or Current staff members completed Guide pages and place it in their file for future reference.