

Employee Coaching Worksheet

Employee Name	<i>Jeff Zimmer</i>
Mentor/Coach	<i>Sally Smith</i>

Continual Learning Plan

Current Process	Processes in Training	Future Training
<i>Reconcile bank statements</i>	<i>Input A/R Receipts</i>	1. <i>Payroll Processing</i>
<i>Approve/Input Vendor Invoices</i>	<i>Monthly Adjustments/Posting</i>	2. <i>Inventory update</i>
<i>Print Monthly Checks</i>		3. <i>Regulatory License Renewal</i>
<i>Prepare/Print/Send Customer Statements</i>		4. <i>Annual Audit "work-paper" preparation</i>
<i>Prepare Invoices</i>		5. <i>Weekly reporting</i>
		6.
		7.

Switchboard Issues

<i>We can improve collections if we age Accounts Receivables 15-30-45-60+ instead of 30-60-90-120+. By the time the account gets to 90 days it is unlikely we can collect. I think this can improve collections by \$30,000-\$60,000/yr.</i>
<i>We can save about 6 hours of work a month if we could integrate our accounting program with our bank.</i>
<i>Each line item on the sales order should be initialed, check-marked or circled to indicate that the item was delivered. When we send an invoice for back ordered items customers call. This makes them angry and wastes a lot of our time.</i>

Projects

MGR?	Description
	<i>Install, test and migrate data to new accounting program.</i>
<i>x</i>	<i>Reorganize regulatory filing system</i>

Values Alignment

	J	F	M	A	M	J	J	A	S	O	N	D
Actively document your processes	x	x		x			x	x	x	x	x	x
Shares ideas and issues with Switchboard				x					x		x	x
Actively learning new processes								x	x	x	x	x
Helps cross-train peers	x			x	x	x			x	x	x	x
Promotes quality and customer satisfaction	x	x	x	x	x	x	x	x	x	x	x	x