

New Coaching Member Assignment

New Member Assignment Next Steps

Coach will receive new member assignments sent via email with the following info:

1. Name
2. Client and Partner Name
3. Enrollment Date
4. Method (phone or email)
5. Other info as appropriate

Coaches next steps:

1. Add to coaching member spreadsheet
2. Add to Coach Spec
3. Add to Google/Outlook Calendar
4. *Welcome Email Sent with *Coach Bio and Maximizing the Coaching Call.Session*
5. *Call Scheduled *if appropriate*

ADDITIONAL NOTES:

- 1) When a member is assigned to you, the following steps need to be taken as quickly as possible:
 - a. **Add to your Coaching Member Spreadsheet** (save an updated copy on the shared drive daily), and Google Calendar
 - b. **Add to CoachSpect**
 - c. Email Coaching: Send Welcome Email (same day or within 3 to 4 business days)
 - i. Welcome Email must include Coach Bio and Maximizing the Coach Session
 - d. Phone coaching: Call or email to schedule first phone coaching session.
 - i. If you have added to your calendar the next day or within the next 2 or 3 days you can send an introductory email with Coach Bio and Maximizing Coach document with Appointment Date/Time.
 - ii. If you need to schedule phone session the following week, then call the member to let them know and also send an email.
 - iii. The point is that we want to communicate with them as soon as possible to schedule or to provide them with the scheduled call's date/time.
 - e. When responding to Coaching Emails:
 - i. Coach responds within 3 to 4 business days.
 - ii. If no response, coach reaches out again to engage in 1 week. If short deadlines are in place, will need to reach out more frequently in attempts to engage.
 - f. When scheduling next Phone coaching call:

- i. Coach works with member to identify best time frame. It can be 4 weeks or 2 weeks out to allow time to implement the action steps they have agreed to work on. It may have to be in a time frame (ie Advocate Health Care) set by the wellness program or it may have to be weekly due to deadlines (ie UBreathe programs).
 - ii. If member misses a scheduled call, coach leaves a detailed voice message with the date/time they will call again (can be the next day if schedule allows or the following week, same day and time). Coach follows up with email to let member know they called and when they will call again. Coach continues to call member, per protocol, until they engage or until they are deactivated (be mindful and take program requirements and your outreach efforts into account before deactivating a member). Coach does NOT stop calling member in attempts to engage when member misses a call.
 - iii. Coach enters a TASK in CoachSpect after an email is sent.
 - iv. Coach enters a TASK in CoachSpect after a coaching call is completed.
 - v. Coach labels each completed Session in CoachSpect
- g. At the beginning of each week, and as needed, Coach prints out Task List to see their work for the week.