

# Coaching/Development Systems Assessment



Reflect back to determine how frequently your organization practices each of the following best practices and check the corresponding box. When finished, add the point value of all your responses and use the scale at the bottom to determine your organization's effectiveness in this particular area.

	STRONGLY AGREE	AGREE	SLIGHTLY AGREE	DISAGREE	STRONGLY DISAGREE
1. We promote our new advisor coaching/development systems during the recruiting process.					
2. Our Organization has a high activity culture.					
3. We have clearly defined expectations we communicate to our advisors in the recruiting or training process.					
4. Our activity expectations are written down and given to our new advisors.					
5. We have clearly defined rewards for achieving our expectations and we communicate these to our new advisors.					
6. We have clearly defined consequences for failing our expectations and we communicate these to our new advisors.					
7. We consistently follow through with consequences for failing our activity expectations.					
8. Our advisors are held accountable for activity commitments.					
9. We have clearly defined production expectations that are communicated to our new advisors.					
10. We consistently follow through with consequences for failing our production expectations.					
11. Our leadership team meets on a regular basis to discuss the development status of our new advisors.					
12. New Advisors are required to participate in daily activity coaching for a set period of time.					
13. We have a clearly defined mentoring program in our organization.					
14. Our new advisors are assigned a formal mentor/coach.					
15. Our mentors have structured meetings with our new advisors on a regular basis.					
16. There is clear communication between members of the leadership team who are involved in new advisor development.					
17. Our new advisors are required to do a certain amount of joint work.					
18. We have a written joint work policy in place.					
19. Our new advisors report their weekly activity in peer accountability groups.					
20. We conduct monthly clientbuilder study groups or peer accountability sessions for new advisors.					
©2021 HOOPIS PERFORMANCE NETWORK	5 POINTS EACH	4 POINTS EACH	3 POINTS EACH	2 POINTS EACH	1 POINT EACH
<b>TALLY TOTALS</b>					
<b>GRAND TOTAL</b>					